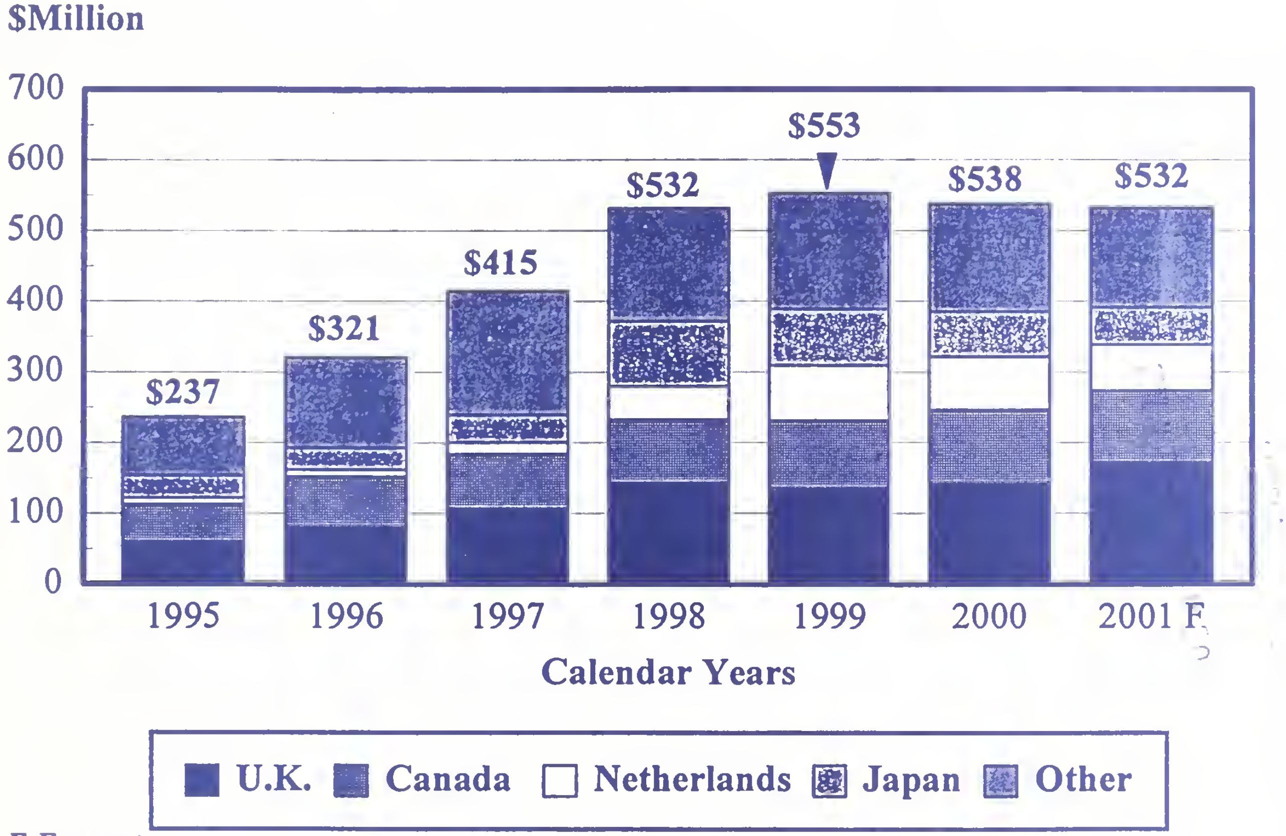
USDA
United States Department of Agriculture

Foreign Agricultural Service

Circular Series
FHORT 02-02
February 2002

World Horticultural Trade and U.S. Export Opportunities

U.S. Wine Exports Are Beginning To Level Off



F-Forecast

Source: U.S. Department of Commerce, Bureau of the Census

Total U.S. wine exports are beginning to level off after years of large increases. Competition for market share heats up on a global scale with new world wine producers expanding wine production and aggressively marketing their products. The more traditional wine-producing countries of the European Union strive to cut production, improve quality, and struggle to maintain market share. Top destinations for U.S. wine include the United Kingdom, Canada, Netherlands, and Japan.

[Check Out the New U.S. Trade Internet System Website. Go to http://www.fas.usda.gov/ustrade]

For further information, contact:
U.S. Department of Agriculture - Foreign Agricultural Service
Horticultural and Tropical Products Division
1400 Independence Ave., S.W. Stop 1049
Washington, DC 20250-1049
Telephone: 202-720-6590
Fax: 202-720-3799
http://www.fas.usda.gov/htp

Frank Tarrant, Director
Scott Bleggi, Deputy Director for Marketing
Brian Grunenfelder, Deputy Director for Analysis

ANALYSIS		
Nancy Hirschhorn	202-720-2974	Situation & outlook supervisor, publication editor, export forecast coordinator, briefing paper coordinator, key development coordinator
Erik Hansen	202-720-0875	Tree nuts, processed vegetables (excl. potatoes), EU trade policy, circular team & homepage coordinator
Bob Knapp	202-720-4620	Canned deciduous fruit, sugar
Edwin Lewis	202-720-5028	Kiwifruit, stone fruit, nursery products, avocados, NAFTA quarterly report, circular web team
Emanuel McNeil	202-720-2083	Fresh vegetables (excl. potatoes), cut flowers
Heather Page Velthuis	202-720-9792	Wine, brandy, table grapes, grape juice
Debra A. Pumphrey	202-720-8899	Fresh and processed citrus, coffee, trade questions on tea, cocoa, essential oils & spices, & information technology coordinator
Rey Santella	202-720-0897	Dried fruit, berries, beer/hops, melons, circular web team
Sam Rosa	202-720-6086	Fresh deciduous fruit, trade issues database coordinator, apple juice, olives, mushrooms
Ryan Scott	202-720-6877	Special projects, circular web team, tropical fruit
Christine Sloop	202-690-2702	SPS/food safety/quality issues coordinator, bilateral technical & policy issues
Martin Patterson	202-720-7304	Policy issues coordinator for subsidies & tariff issues, tariff rate quotas & licensing, trade agreements, multilateral policy issues, biotechnology issues
MARKETING		
Steve Shnitzler	202-720-8495	Apricots, avocados, ginseng, pomegranates, Bartlett pears, kiwi
Ted Goldammer	202-720-8498	Potatoes (marketing & analysis), apples, hops, sweet cherries, QSP
Sonia Jimenez	202-720-0898	Citrus, winter pears, peaches, plums, nectarines, Section 108
Kristin Kezar	202-690-0556	Tart cherries, canned fruit, papaya, melons, raisins
Elizabeth Mello	202-720-9903	Vegetables, berries, Cochran/EMO programs, Produce Marketing Association (PMA), Chocolate Manufacturers Association
Ingrid Mohn	202-720-5330	Tree nuts, prunes (dried plums)
Elias Orozco	202-720-6791	Honey (analysis & marketing), website updates
Yvette Wedderburn Bomersheim	202-720-0911	Wine, brandy, grape juice, table grapes, Export credit programs

Table of Contents

Export Summary

November 2001

U.S. exports of horticultural products to all countries in November totaled $971 million, a drop of 3 percent from the same month a year earlier. The only categories with increases in November were tree nuts (up 3 percent to $141 million), essential oils (up 15 percent to $60 million), and juices (up 17 percent to $55 million). The categories with the most significant decreases were wine and beer (down 15 percent to $50 million) processed fruit (down 11 percent to $57 million), and fresh vegetables (down 9 percent to $94 million.

November exports to China were up 64 percent to $15 million, while exports to the Philippines rose 36 percent, to $18 million, and exports to Korea rose 15 percent from November 2000 to $23 million. Exports to most major markets declined in November, with sharp declines in sales to Hong Kong (down 30 percent to $42 million), Korea (down 26 percent to $22 million), and Japan (down 9 percent to $124 million).

Exports for the October-November 2001 period were down 2 percent from the same period in 2000 to $2.03 billion. Tree nut exports were up about 1 percent to $354 million for the October-November 2001 period, while processed vegetables were up almost 3 percent to $317 million, and

essential oils exports were up 11 percent to $113 million. All other categories declined. The fastest growing markets for FY 2002 to date are: Venezuela, up 28 percent; China, up 25 percent; Malaysia, up 20 percent; Korea, up 16 percent; Mexico, up 15 percent; and the Philippines, up 12 percent. Exports to most other major markets declined during the October-November 2001 period from the same period in 2000.

New U.S. Trade Internet System Facilitates Public Access to Trade Data

The public now has unlimited access to the most up-to-date data on U.S. exports and imports of agricultural, fishery, and forestry products, to the 10-digit Harmonized System (HS) classification code level. The U.S. Trade Internet System allows users the flexibility to customize their data searches and save their criteria for repeated use. Users can obtain value or volume data for selected HS codes or commodity groupings to track trends going back to 1989.

To view the site go to **http://www.fas.usda.gov/ustrade/**
For more information on the U.S. Trade Internet System, e-mail usthelp@fas.usda.gov

To access **FAS Attache Reports** on line, please go to the following Internet address:
Http:// www.fas.usda.gov/scripts/attachrep/default.asp

Search through the country and market reports prepared by FAS attaches covering over 20 horticultural and tropical product commodities and nearly 130 countries.

What's New on the Homepage?

The Horticultural and Tropical Products Division now updates its homepage weekly to bring the latest information to the public as efficiently as possible. The site contains information on policy and technical developments affecting trade in horticultural commodities, selected reports submitted by FAS overseas offices, and special reports. For further information, please contact Nancy Hirschhorn (202)720-2974. Go to http://www.fas.usda.gov/htp/.

Fresh Citrus Situation

Total Northern Hemisphere citrus production in 2001/02 is estimated at 47.6 million tons, only slightly ahead of the previous year. Although some key producing countries are reporting gains, weather developments in other countries have offset any increase. U.S. production in 2001/02 is estimated at 15.0 million tons, only 1 percent ahead of last year. Cuba's production of citrus has been drastically reduced as a result of Hurricane Michelle. Greece's citrus crops took a severe blow as a result of the snows and freezing temperatures during the first part of January 2002.

Northern Hemisphere

United States

Total citrus production in 2001/02 is estimated at 15.0 million tons, up 1 percent from the previous year. Orange production is forecast to increase to 11.4 million tons, grapefruit production to increase to 2.3 million tons, and tangerine production to increase to 476,000 tons, while lemon production is down nearly 5 percent to 865,000 tons, and lime production continues to decrease, estimated at only 6,000 tons in 2001/02.

Total U.S. exports of citrus are forecast at 1.1 million tons, 1 percent ahead of the 2000/01 level. Oranges are estimated to account for 53 percent of exports, grapefruit 36 percent, and lemons 10 percent. Small amounts of tangerines and limes make up the rest. Although the California navel crop is down 11 percent in 2001/02, the U.S. orange export market situation remains favorable. U.S. exports of oranges in November-October 2000/01 were 566,976 tons, an increase of 9 percent from the previous year. Although Canada remains the largest export destination, seven of the top ten destinations are in Asia, and they collectively accounted for 66 percent of total U.S. exports. U.S. exports of grapefruit are forecast at 395,000 tons in 2001/02, an increase of nearly 2 percent from 2000/01. Japan remains the largest export destination for U.S. grapefruit, accounting for 51 percent of the total in 2000/01.

U.S. imports of citrus are forecast down to 335,000 tons, a drop of 60,000 tons from the 2000/01 level. Although U.S. imports of oranges are forecast to remain stable, several factors will affect the imports of other citrus. U.S. imports of tangerines in 2001/02 are forecast at only 60,000 tons, down from 100,000 tons the previous year. Early in December 2001, USDA banned the imports of clementines from Spain after the discovery of live Mediterranean fruit fly larvae in the Spanish fruit in several U.S. states. This ban occurred during the peak shipping season for Spain's exporters. U.S. imports of lemons are forecast at 20,000 tons in 2001/02, a decline of nearly 40 percent from the previous year. U.S. imports of lemons had climbed to 33,000 tons in 2000/01 after Argentina was granted access to the U.S. market. However, a court decision in September 2001 ruled against

USDA's import protocol and imports of lemons from Argentina were halted. U.S. imports of limes during 2001/02 are forecast at 180,000 tons, down 8,000 tons from 2000/01.

In fiscal year (FY) 2001 the citrus industry received approximately $5.3 million to conduct promotions overseas under the USDA's Market Access Program (MAP). The MAP has been instrumental in expanding markets for U.S. citrus in Canada, France, Poland, UK, China, Hong Kong, Japan, Korea, Taiwan, Austria/Switzerland, Belgium/Netherlands, Scandinavia, Singapore, and Malaysia. Consumer and trade promotions are developed for fresh oranges, fresh grapefruit, lemons, orange juice, and grapefruit juice.

A new allocation of MAP funds will take place in June 2002. The industry shares the cost of promotions under the program. In addition to MAP funds, the citrus industry received USDA funds for market research under the Emerging Markets Program and for market development under the Section 108 program.

Cuba

Cuba's citrus production for 2001/02 was significantly damaged when Hurricane Michelle ripped through the island in early November, during the peak of the grapefruit harvesting period The storm passed east of Jaguey Grande, Cuba's largest citrus production area. Cuba's total citrus production during 2001/02 is estimated at 527,000 tons, down 32 percent from a year ago. Cuba's production of citrus had been expected to total 900,000 tons, a healthy increase from the 2000/01 level. Orange production is estimated at 340,000 tons, down 24 percent from a year ago. Grapefruit production is estimated at 175,000 tons, a significant drop from the 310,000-ton level a year ago. Prior to the hurricane damage, Cuba had been expected to be the world's third-largest producer of grapefruit. Citrus production will also be affected in the future, as the hurricane destroyed trees and caused the trees to drop their fruit.

According to reports, Cuba in recent years has diverted a growing percentage of its citrus crop to processed products. According to sources, in 1999/2000, almost half of the orange output and almost all of the grapefruit output, was sent to processing. The hurricane also damaged processing facilities. Cuba is a major player in the grapefruit juice market.

Greece

Extreme weather conditions, including snow storms, frost and low temperatures, during the first week of January 2002 have significantly hurt Greece's citrus production. Greece's citrus production for 2001/02 is estimated at 655,000 tons, a drop of nearly half the previous year's level. According to sources, the regions which were hit the hardest were Evia, Central Greece, Northern Peloponesse, Central Macedonia, and Crete. The orange crop for 2001/02 is estimated at 500,000 tons, down from 975,000 in 2000/01. Farmers were keeping oranges on the tree rather than harvesting them, in anticipation of higher prices. Lemon production is estimated at 80,000 tons, down 50,000 tons from

the previous year. Tangerines and most of the clementines were harvested before the severe weather hit production areas.

As a result of the lower production numbers, Greece's exports of citrus will be significantly reduced as well. Exports are forecast at only 225,000 tons, nearly half the previous year's level. During calendar year 2000, only 16 percent of Greece's oranges went to other EU countries; 33 percent went to East European countries.

Spain

Spain's total 2001/02 citrus crop is forecast to reach 4.8 million tons, about 3 percent lower than last year. Orange production is forecast to remain near last year's level of 2.7 million tons. Lemon production is expected to increase about 9 percent, while tangerines will decrease by 10 percent. In Castellon, there has been a decrease in area planted because some former citrus areas are becoming industrialized, and because that region is affected by tristeza, a serious plant disease. High temperatures in May affected the regular setting of the fruit, while hailstorms in early May damaged the trees. High temperatures in October and the beginning of November contributed to an early ripening of fruit. Warm weather also increased the presence of Mediterranean fruit fly. In addition, frost and rains in December affected the some of the citrus crop.

Total area devoted to citrus production remains relatively constant, with some orange area being replaced by tangerine groves. Production in Valencia (about 66 percent of output) continues to account for the majority of Spain's citrus crop, followed by Andalucia and Murcia.

Total Spanish citrus exports during calendar year 2000 were 3.3 million tons, almost 18 percent higher than the previous year. About 80 percent is exported to other EU countries. Total citrus exports during 2001/02 are forecast to decline about 5 percent to 2.5 million tons. Most of the reduction is forecast to occur in the export of clementines. The ban recently imposed by the United States on the import of clementines from Spain due to medfly-related problems is expected to result in a drop in Spain's exports of about 14 percent.

Italy

Italy's citrus production for the 2001/02 marketing year is forecast at 3.3 million tons. This is an 8-percent increase from the 2000/01 level. The increased production is due to more favorable weather conditions, which helped yields to recover. In fact, while overall citrus planted area remained stable, orange orchards declined slightly and mandarin orchards dropped, but clementine and grapefruit crops increased.

The increase in grapefruit output is due to increased planted area as orange and lemon producers, especially in the Calabria region in southern Italy, replaced some of their "blonde" oranges with grapefruit, which has better market potential. Producers are planting more pink grapefruit varieties

to meet consumer demand for sweeter grapefruit. The market prospects for Italian oranges have declined over the last several years, due mainly to strong competition in the European market from Spain and marketing inefficiencies. Italy's citrus producers have been unable to set up a marketing organization that is efficient enough to satisfy the needs of the large distribution companies both in Italy and in Northern and Eastern Europe. Italy has had some success marketing its Tarocco variety, a blood orange with red pulp that is unique to southern Italy and Sicily, as a specialty item. However, the Tarocco is only harvested from December to March so the Italian traders are unable to supply their customers during the full marketing season and they have not been able to capitalize on its uniqueness to build a strong seasonal demand.

In Italy, citrus fruit consumption is very dependent on availability and price, with consumers willing to substitute other fruits based on price and a wish for variety. Consumption for 2001/02 is forecast to grow because of a large supply, especially for oranges. Grapefruit consumption has risen in Italy in recent years and is forecast to rise in 2001/02, too. The consumption increase is mainly due to a larger supply of pink grapefruit that is strongly preferred by consumers. For 2001/02, Italy's citrus exports are expected to increase further except for lemons, which have remained stable since 1999. The major markets for orange exports continue to be mainly EU countries and Switzerland.

Italy's citrus imports in 2001/02 are forecast to decline about 4 percent to 179,000 tons. Italy's importers of oranges have started to shift their source to countries outside the EU. Imports from South Africa, Cyprus, and Argentina increased strongly, whereas imports from Spain declined. Italy's grapefruit imports in 2001/02 are forecast at 30,000 tons, unchanged from the preliminary 2000/02 level. Israel remains the major supplier of grapefruit to Italy, while imports from the United States dropped due to the high value of the dollar. However, it is believed that small quantities of U.S. grapefruit are transhipped through other EU ports and thus do not show up on trade statistics.

Mexico

Total citrus production in Mexico during 2001/02 is estimated at 5.0 million tons, down nearly 8 percent from the previous year. Orange production for 2001/02 is forecast at 3.1 million tons, a decrease of 11 percent compared to 2000/01, due to the alternate bearing nature of the crop. Also, Veracruz had weather-related problems that will hurt production. The third and fourth blooms were affected by untimely rainfall and warm weather, which reduced flowering and fruit set for the last part of the season. However, orange trees had good first and second blooms in Veracruz, due to timely rainfall. It is expected that the Valencia harvest will be good, although not as large as the 2000/01 crop. Production in San Luis Potosí was also affected by untimely rainfall. Production will also be affected because some areas in Veracruz have been abandoned due to low market prices and high input costs. The 2001/02 forecast for oranges destined for processing is 370,000 tons, a 12-percent increase compared to 2000/01, due to industry expectations of higher international frozen concentrate orange juice prices (FCOJ).

Japan

Japan's economic recession will affect the sales of citrus products in 2001/02. Japan's imports of oranges during 2001/02 are forecast at 130,000 tons, down from 132,000 tons imported in 2000/01. Grapefruit imports are forecast to increase marginally to 275,000 tons with approximately 187,000 tons coming from Florida. The Japanese lemon market is fairly stable, with imports of approximately 90,000 tons forecast for 2001/02.

With the economic downturn, Japan's consumers began belt-tightening their family food spending, carefully selecting products and looking for the best value for the price. Consumption of citrus products has been declining marginally. This trend is likely to continue in the 2001/02 season, assuming the current market situation continues. Without continued high-quality products and price reductions, increased sales of citrus are unlikely.

Korea

Through November 2001, fresh orange imports totaled 91,192 tons, of which 88,975 tons came from the United States. An estimated 32,041 tons of the total entered under the reduced tariff Minimum Market Access (MMA) quota. The MMA quota for 2001 was 40,046 tons. The Cheju Citrus Grower's Agricultural Cooperative (CCGAC), administrators of Korea's MMA citrus quota, started auctioning off MMA quota shares in June this year. Four such quota auctions netted awards of 4,140 tons. Though CCGAC had stated earlier in the year that the 2001 MMA quota would be filled, that did not happen. For the second consecutive year, out-of-quota imports exceeded the in-quota amount.

Several events in 2002 may help U.S. orange sales to Korea. The FIFA World Cup games and a Presidential election, coupled with a stable foreign currency should provide strong stimuli for greater citrus demand. The United States' ability to provide quality fruit at a reasonable price should enable it to continue to attract the Korean consumer and to maintain a favored supplier position.

China

China's citrus production for 2001/02 is expected to increase by 10 percent to 8.8 million tons due to good weather conditions and the alternating production year cycle. Tangerine production accounts for about 67 percent of total citrus production, or 5.9 million tons. Orange production accounts for 33 percent of total citrus production, or 2.9 million tons. China can produce good quality citrus, but the quality quickly declines after harvesting due to excessive handling during distribution and sales. Post-harvest practices of washing, waxing, and packing tend to be rare. Approximately 80 percent of China's citrus is harvested during November and December. China's processing industry uses between 5 and 10 percent of the citrus crop each year. The amount of citrus used for canning this year should increase compared to last year, because of the larger crop. Canned fruit is the main processed citrus product and mandarin oranges are the variety of choice for most

canners.

While China's citrus exports exceed its imports, exports are mostly comprised of fresh tangerines and canned citrus. When these two products are not considered, China's imports are greater. The United States still is China's main source of imported oranges. During the year 2001, most tariffs on imported fresh citrus and processed citrus products decreased, but most cuts were small. By the year 2004, fresh citrus tariffs are scheduled to fall to 12 percent.

Southern Hemisphere

Forecasts for the Southern Hemisphere are unavailable at this time.

(This article was prepared or estimated on the basis of official statistics of foreign governments, other foreign source material, and, in particular, reports of Agricultural Attachés and Foreign Service Officers, results of office research, and related information. The FAS Attaché Report search engine contains reports on the Fresh Citrus industries for more than 10 countries, including Argentina, Brazil, China, Greece, Italy, and Spain. For information on production and trade, contact Debra A. Pumphrey at 202-720-8899.)

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

TOTAL CITRUS

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
		(1,000 Metric tons)				
Northern Hemisphere Mediterranean Basin						
Cyprus						
	1999/00	301	0	98	152	51
	2000/01	207	0	88	77	42
	2001/02	215	0	94	77	44
Egypt						
	1999/00	2,470	0	235	2,194	41
	2000/01	2,438	0	248	2,146	44
	2001/02	2,475	0	258	2,172	45
Gaza						
	1999/00	124	0	64	60	6
	2000/01	124	0	64	60	6
	2001/02	124	0	64	60	6
Greece						
	1999/00	1,250	12	321	545	396
	2000/01	1,190	12	437	473	292
	2001/02	655	36	225	313	153
Israel						
	1999/00	800	15	254	177	384
	2000/01	664	0	205	145	314
	2001/02	667	0	220	150	297
Italy						
	1999/00	2,899	196	238	1,699	1,158
	2000/01	3,022	186	255	1,744	1,209
	2001/02	3,260	179	270	1,852	1,317
Morocco						
	1999/00	1,478	0	636	665	177
	2000/01	1,045	0	399	568	78
	2001/02	1,135	0	500	585	50
Spain						
	1999/00	5,433	79	3,099	1,305	1,108
	2000/01	4,941	117	2,668	1,447	943
	2001/02	4,815	115	2,540	1,470	920
Turkey						
	1999/00	2,502	17	401	1,652	466
	2000/01	2,672	33	471	1,614	620
	2001/02	2,595	20	500	1,552	563
Subtotal Mediterranean Basin						
	1999/00	17,257	319	5,346	8,449	3,787
	2000/01	16,303	348	4,835	8,274	3,548
	2001/02	15,941	350	4,671	8,231	3,395
Other Northern Hemisphere						
China						
	1999/00	9,708	21	156	8,969	604
	2000/01	8,039	51	182	7,678	230
	2001/02	8,832	57	210	8,335	344
Cuba						
	1999/00	769	0	30	154	585
	2000/01	779	0	35	159	585
	2001/02	527	0	10	77	440
Japan						
	1999/00	1,817	500	5	2,027	285
	2000/01	1,504	503	5	1,876	126
	2001/02	1,636	508	5	2,004	135

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

TOTAL CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
			(1,000 Metric tons)		
South Korea					
1999/00	635	1	6	597	33
2000/01	563	1	8	529	27
2001/02	640	2	10	562	70
Mexico					
1999/00	5,218	42	277	4,274	709
2000/01	5,380	33	267	4,514	632
2001/02	4,975	33	274	4,062	672
United States					
1999/00	15,673	328	1,051	3,068	11,882
2000/01	14,871	395	1,086	3,207	10,973
2001/02	15,042	335	1,099	2,965	11,313
Subtotal Other Northern Hemisphere					
1999/00	33,820	892	1,525	19,089	14,098
2000/01	31,136	983	1,583	17,963	12,573
2001/02	31,652	935	1,608	18,005	12,974
Total Northern Hemisphere					
1999/00	51,077	1,211	6,871	27,538	17,885
2000/01	47,439	1,331	6,418	26,237	16,121
2001/02	47,593	1,285	6,279	26,236	16,369
Southern Hemisphere					
Argentina					
1999/00	2,581	20	289	1,178	1,134
2000/01	2,706	14	408	1,187	1,125
2001/02	N/A	N/A	N/A	N/A	N/A
Australia					
1999/00	616	11	139	188	300
2000/01	428	13	91	180	170
2001/02	N/A	N/A	N/A	N/A	N/A
Brazil					
1999/00	17,136	0	90	5,418	11,628
2000/01	14,117	0	122	4,488	9,507
2001/02	N/A	N/A	N/A	N/A	N/A
South Africa					
1999/00	1,417	2	770	215	434
2000/01	1,510	2	820	300	392
2001/02	N/A	N/A	N/A	N/A	N/A
Total Southern Hemisphere					
1999/00	21,750	33	1,288	6,999	13,496
2000/01	18,761	29	1,441	6,155	11,194
2001/02	N/A	N/A	N/A	N/A	N/A
Total World					
1999/00	72,827	1,244	8,159	34,537	31,381
2000/01	66,200	1,360	7,859	32,392	27,315
2001/02	N/A	N/A	N/A	N/A	N/A

1/ Forecast.
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

FRESH ORANGES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1999/00	237	0	59	143	35
2000/01	129	0	40	65	24
2001/02	140	0	50	65	25
Egypt					
1999/00	1,637	0	208	1,406	23
2000/01	1,610	0	225	1,357	28
2001/02	1,642	0	230	1,382	30
Gaza 4/					
1999/00	105	0	50	55	0
2000/01	105	0	50	55	0
2001/02	105	0	50	55	0
Greece					
1999/00	1,040	1	267	394	380
2000/01	975	1	371	328	277
2001/02	500	1	180	180	141
Israel					
1999/00	327	10	89	96	152
2000/01	225	0	71	69	85
2001/02	220	0	77	70	73
Italy					
1999/00	1,750	57	135	1,042	630
2000/01	1,800	59	143	1,106	610
2001/02	1,980	55	150	1,185	700
Morocco					
1999/00	845	0	298	417	130
2000/01	693	0	240	415	38
2001/02	725	0	300	375	50
Spain					
1999/00	2,828	77	1,484	641	780
2000/01	2,688	110	1,400	700	698
2001/02	2,700	100	1,400	730	670
Turkey					
1999/00	1,100	0	102	888	110
2000/01	1,070	0	115	848	107
2001/02	1,040	0	130	806	104
Subtotal Mediterranean Basin					
1999/00	9,869	145	2,692	5,082	2,240
2000/01	9,295	170	2,655	4,943	1,867
2001/02	9,052	156	2,567	4,848	1,793
Other Northern Hemisphere					
China					
1999/00	3,236	19	8	3,085	162
2000/01	2,907	49	3	2,893	60
2001/02	2,924	55	3	2,918	58
Cuba					
1999/00	440	0	10	100	330
2000/01	450	0	15	105	330
2001/02	340	0	5	50	285
Japan					
1999/00	21	129	0	148	2
2000/01	19	132	0	149	2
2001/02	19	130	0	147	2

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

FRESH ORANGES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
			(1,000 Metric tons)		
Mexico					
1999/00	3,385	32	11	2,996	410
2000/01	3,500	22	19	3,173	330
2001/02	3,100	22	20	2,732	370
United States 5/					
1999/00	11,876	48	519	1,495	9,910
2000/01	11,293	55	567	1,671	9,110
2001/02	11,422	55	580	1,417	9,480
Subtotal Other Northern Hemisphere					
1999/00	18,958	228	548	7,824	10,814
2000/01	18,169	258	604	7,991	9,832
2001/02	17,805	262	608	7,264	10,195
Total Northern Hemisphere					
1999/00	28,827	373	3,240	12,906	13,054
2000/01	27,464	428	3,259	12,934	11,699
2001/02	26,857	418	3,175	12,112	11,988
Southern Hemisphere					
Argentina					
1999/00	789	12	41	620	140
2000/01	861	7	98	626	144
2001/02	N/A	N/A	N/A	N/A	N/A
Australia					
1999/00	616	11	139	188	300
2000/01	428	13	91	180	170
2001/02	N/A	N/A	N/A	N/A	N/A
Brazil					
1999/00	17,136	0	90	5,418	11,628
2000/01	14,117	0	122	4,488	9,507
2001/02	N/A	N/A	N/A	N/A	N/A
South Africa 6/					
1999/00	1,119	1	570	197	353
2000/01	1,150	1	580	270	301
2001/02	N/A	N/A	N/A	N/A	N/A
Total Southern Hemisphere					
1999/00	19,660	24	840	6,423	12,421
2000/01	16,556	21	891	5,564	10,122
2001/02	N/A	N/A	N/A	N/A	N/A
Total World					
1999/00	48,487	397	4,080	19,329	25,475
2000/01	44,020	449	4,150	18,498	21,821
2001/02	N/A	N/A	N/A	N/A	N/A

1/ Forecast.
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.
4/ Tangerine production is small and is included with oranges.
5/ Includes Temples.
6/ Includes small quantities of tangerines.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

FRESH TANGERINES

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
		(1,000 Metric tons)				
Northern Hemisphere Mediterranean Basin						
Egypt						
	1999/00	478	0	10	463	5
	2000/01	481	0	8	471	2
	2001/02	483	0	10	473	0
Greece						
	1999/00	85	0	30	51	4
	2000/01	85	0	34	49	2
	2001/02	75	0	30	43	2
Israel						
	1999/00	120	0	35	40	45
	2000/01	86	0	30	30	26
	2001/02	96	0	36	33	27
Italy						
	1999/00	594	72	67	414	185
	2000/01	592	56	74	376	198
	2001/02	640	53	79	404	210
Morocco 4/						
	1999/00	511	0	272	229	10
	2000/01	222	0	99	123	0
	2001/02	400	0	200	200	0
Spain						
	1999/00	2,070	2	1,400	410	262
	2000/01	1,779	7	1,150	450	186
	2001/02	1,600	15	990	440	185
Turkey						
	1999/00	500	0	121	329	50
	2000/01	560	0	157	347	56
	2001/02	550	0	170	325	55
Subtotal Mediterranean Basin						
	1999/00	4,358	74	1,935	1,936	561
	2000/01	3,805	63	1,552	1,846	470
	2001/02	3,844	68	1,515	1,918	479
Other Northern Hemisphere						
China						
	1999/00	6,472	2	148	5,884	442
	2000/01	5,132	2	179	4,785	170
	2001/02	5,908	2	207	5,417	286
Cuba						
	1999/00	5	0	0	5	0
	2000/01	5	0	0	5	0
	2001/02	2	0	0	2	0
Japan 5/						
	1999/00	1,704	9	5	1,428	280
	2000/01	1,398	13	5	1,285	121
	2001/02	1,532	13	5	1,410	130
South Korea						
	1999/00	635	1	6	597	33
	2000/01	563	1	8	529	27
	2001/02	640	2	10	562	70

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

FRESH TANGERINES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
			(1,000 Metric tons)		
United States 6/					
1999/00	505	96	28	366	207
2000/01	421	100	14	350	157
2001/02	476	60	10	360	166
Subtotal Other Northern Hemisphere					
1999/00	9,321	108	187	8,280	962
2000/01	7,519	116	206	6,954	475
2001/02	8,558	77	232	7,751	652
Total Northern Hemisphere					
1999/00	13,679	182	2,122	10,216	1,523
2000/01	11,324	179	1,758	8,800	945
2001/02	12,402	145	1,747	9,669	1,131
Southern Hemisphere					
Argentina					
1999/00	438	0	25	377	36
2000/01	474	0	32	404	38
2001/02	N/A	N/A	N/A	N/A	N/A
Total Southern Hemisphere					
1999/00	438	0	25	377	36
2000/01	474	0	32	404	38
2001/02	N/A	N/A	N/A	N/A	N/A
Total World					
1999/00	14,117	182	2,147	10,593	1,559
2000/01	11,798	179	1,790	9,204	983
2001/02	N/A	N/A	N/A	N/A	N/A

1/ Forecast
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.
4/ Clementines only
5/ Mainly satsumas (also called mandarin or unshu mikan, but also including mandarin hybrids.
6/ Includes tangelos which account for about half of combined tangerine and tangelo production. Export and import data include mandarins.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

FRESH GRAPEFRUIT

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Northern Hemisphere Mediterranean Basin					
Cyprus					
1999/00	36	0	23	3	10
2000/01	53	0	34	7	12
2001/02	50	0	30	7	13
Gaza					
1999/00	10	0	5	5	0
2000/01	10	0	5	5	0
2001/02	10	0	5	5	0
Israel					
1999/00	324	5	121	23	185
2000/01	322	0	95	25	202
2001/02	320	0	98	27	195
Italy					
1999/00	12	28	3	35	2
2000/01	20	30	5	40	5
2001/02	30	30	8	45	7
Turkey					
1999/00	140	0	72	54	14
2000/01	135	0	86	36	13
2001/02	140	0	90	36	14
Subtotal Mediterranean Basin					
1999/00	522	33	224	120	211
2000/01	540	30	225	113	232
2001/02	550	30	231	120	229
Other Northern Hemisphere					
Cuba					
1999/00	310	0	20	35	255
2000/01	310	0	20	35	255
2001/02	175	0	5	15	155
Japan					
1999/00	0	270	0	270	0
2000/01	0	274	0	274	0
2001/02	0	275	0	275	0
Mexico					
1999/00	240	9	2	215	32
2000/01	250	10	3	223	34
2001/02	225	10	4	197	34
United States					
1999/00	2,506	6	394	649	1,469
2000/01	2,240	19	388	610	1,261
2001/02	2,273	20	395	625	1,273
Subtotal Other Northern Hemisphere					
1999/00	3,056	285	416	1,169	1,756
2000/01	2,800	303	411	1,142	1,550
2001/02	2,673	305	404	1,112	1,462
Total Northern Hemisphere					
1999/00	3,578	318	640	1,289	1,967
2000/01	3,340	333	636	1,255	1,782
2001/02	3,223	335	635	1,232	1,691

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

FRESH GRAPEFRUIT

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
			(1,000 Metric tons)		
Southern Hemisphere					
Argentina					
1999/00	189	8	18	99	80
2000/01	191	7	24	93	81
2001/02	N/A	N/A	N/A	N/A	N/A
South Africa					
1999/00	186	1	134	9	44
2000/01	240	1	180	10	51
2001/02	N/A	N/A	N/A	N/A	N/A
Total Southern Hemisphere					
1999/00	375	9	152	108	124
2000/01	431	8	204	103	132
2001/02	N/A	N/A	N/A	N/A	N/A
Total World					
1999/00	3,953	327	792	1,397	2,091
2000/01	3,771	341	840	1,358	1,914
2001/02	N/A	N/A	N/A	N/A	N/A

1/ Forecast.
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

FRESH LEMONS

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
		(1,000 Metric tons)				
Northern Hemisphere Mediterranean Basin						
Cyprus						
	1999/00	28	0	16	6	6
	2000/01	25	0	14	5	6
	2001/02	25	0	14	5	6
Gaza						
	1999/00	9	0	9	0	6
	2000/01	9	0	9	0	6
	2001/02	9	0	9	0	6
Greece						
	1999/00	125	11	24	100	12
	2000/01	130	11	32	96	13
	2001/02	80	35	15	90	10
Israel						
	1999/00	18	0	1	15	2
	2000/01	16	0	0	15	1
	2001/02	17	0	0	15	2
Italy						
	1999/00	543	39	33	208	341
	2000/01	610	41	33	222	396
	2001/02	610	41	33	218	400
Morocco						
	1999/00	112	0	66	9	37
	2000/01	120	0	60	20	40
	2001/02	0	0	0	0	0
Spain						
	1999/00	520	0	214	254	52
	2000/01	460	0	117	297	46
	2001/02	500	0	150	300	50
Turkey						
	1999/00	762	17	106	381	292
	2000/01	907	33	113	383	444
	2001/02	865	20	110	385	390
Subtotal Mediterranean Basin						
	1999/00	2,117	67	469	973	748
	2000/01	2,277	85	378	1038	952
	2001/02	2,106	96	331	1013	864
Other Northern Hemisphere						
Japan						
	1999/00	2	92	0	94	0
	2000/01	2	84	0	86	0
	2001/02	2	90	0	92	0
United States						
	1999/00	762	17	106	381	292
	2000/01	907	33	113	383	444
	2001/02	865	20	110	385	390

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

FRESH LEMONS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Subtotal Other Northern Hemisphere					
1999/00	764	109	106	475	292
2000/01	909	117	113	469	444
2001/02	867	110	110	477	390
Total Northern Hemisphere					
1999/00	2,881	176	575	1,448	1040
2000/01	3,186	202	491	1,507	1396
2001/02	2,973	206	441	1,490	1254
Southern Hemisphere					
Argentina					
1999/00	1,165	0	205	82	878
2000/01	1,180	0	254	64	862
2001/02	N/A	N/A	N/A	N/A	N/A
South Africa					
1999/00	112	0	66	9	37
2000/01	120	0	60	20	40
2001/02	N/A	N/A	N/A	N/A	N/A
Total Southern Hemisphere					
1999/00	1,277	0	271	91	915
2000/01	1,300	0	314	84	902
2001/02	N/A	N/A	N/A	N/A	N/A
Total World					
1999/00	4,158	176	846	1,539	1,955
2000/01	4,486	202	805	1,591	2,298
2001/02	N/A	N/A	N/A	N/A	N/A

1/ Forecast.
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons usually begins earlier and often extends throughout the year.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

OTHER CITRUS

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
		(1,000 Metric tons)				
Northern Hemisphere						
Mediterranean Basin						
Egypt 4/	1999/00	355	0	17	325	13
	2000/01	347	0	15	318	14
	2001/02	350	0	18	317	15
Israel	1999/00	11	0	8	3	0
	2000/01	15	0	9	6	0
	2001/02	14	0	9	5	0
Morocco	1999/00	10	0	0	10	0
	2000/01	10	0	0	10	0
	2001/02	10	0	0	10	0
Spain 5/	1999/00	15	0	1	0	14
	2000/01	14	0	1	0	13
	2001/02	15	0	0	0	15
Subtotal Mediterranean Basin	1999/00	391	0	26	338	27
	2000/01	386	0	25	334	27
	2001/02	389	0	27	332	30
Other Northern Hemisphere						
Cuba 4/	1999/00	14	0	0	14	0
	2000/01	14	0	0	14	0
	2001/02	10	0	0	10	0
Japan 6/	1999/00	90	0	0	87	3
	2000/01	85	0	0	82	3
	2001/02	83	0	0	80	3
Mexico 7/	1999/00	1,593	1	264	1,063	267
	2000/01	1,630	1	245	1,118	268
	2001/02	1,650	1	250	1,133	268
United States 7/	1999/00	24	161	4	177	4
	2000/01	10	188	4	193	1
	2001/02	6	180	4	178	4
Subtotal Other Northern Hemisphere	1999/00	1,721	162	268	1,341	274
	2000/01	1,739	189	249	1,407	272
	2001/02	1,749	181	254	1,401	275
Total Northern Hemisphere	1999/00	2,112	162	294	1,679	301
	2000/01	2,125	189	274	1,741	299
	2001/02	2,138	181	281	1,733	305

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1999/2000 - 2001/2002 1/

OTHER CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Total World					
1999/00	2,112	162	294	1,679	301
2000/01	2,125	189	274	1,741	299
2001/02	2,138	181	281	1,733	305

1/ Forecast.
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of limes usually begins earlier and often extends throughout the year.
4/ Mostly limes but some sour oranges and other varieties.
5/ Sour oranges.
6/ Summer oranges (Natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo).
7/ Limes.

U.S. EXPORTS OF FRESH ORANGES AND TEMPLES
MARKETING YEARS *

Destination	1996/1997	1997/1998	1998/1999	1999/2000	2000/2001
			Metric tons		
Canada	200,989	202,009	90,605	163,840	159,324
Japan	124,857	129,289	50,185	106,144	113,631
Hong Kong	139,449	175,258	35,646	88,418	85,918
Korea; Republic of	31,978	26,540	15,579	68,320	81,780
Malaysia	21,401	20,140	9,390	16,345	26,446
China	127	3,196	54	10,842	26,369
Taiwan	18,517	27,549	17,292	17,293	19,673
Singapore	20,041	20,369	9,418	17,096	18,138
Mexico	5,218	6,318	6,620	8,426	11,457
Australia	10,348	11,213	3,993	9,032	9,198
New Zealand	6,310	7,754	3,359	3,624	5,948
Philippines	9,398	4,618	636	3,070	3,606
Indonesia	4,776	586	313	1,941	1,559
Vietnam	292	366	17	293	601
Chile	0	246	256	617	506
Other Countries	7,829	9,504	1,752	3,444	2,822
Grand Total	601,530	644,955	245,115	518,745	566,976

*Marketing year November-October.

U.S. EXPORTS OF FRESH GRAPEFRUIT
MARKETING YEARS *

Destination	1998/1999	1999/2000	2000/2001	2000/2001 Sept.-Oct.	2001/2002 Sept.-Oct.
			Metric tons		
Japan	197,801	207,071	198,726	10,109	10,045
Canada	54,193	51,058	47,985	7,839	7,077
France	50,021	41,921	45,611	2,304	4,351
Netherlands	38,488	29,675	28,120	1,838	4,196
Germany	19,335	16,516	15,556	506	474
Taiwan	18,783	12,807	12,646	592	151
United Kingdom	19,238	11,954	12,491	1,099	1,445
Belgium-Luxembourg	12,487	8,641	9,394	715	2,407
Switzerland	882	3,403	2,838	141	275
Hong Kong	2,815	1,332	2,144	295	351
Other Countries	11,663	9,777	12,576	611	1,053
Grand Total	425,706	394,155	388,087	26,049	31,825

*Marketing year September-August.

U.S. EXPORTS OF FRESH LEMONS
MARKETING YEARS 1997/1998 - 2000/2001 *

Destination	1998/1999	1999/2000	2000/2001	2000/2001 Aug.-Oct.	2001/2002 Aug.-Oct.
			Metric tons		
Japan	73,088	69,654	70,238	12,253	11,863
Canada	25,354	22,551	25,719	3,807	1,920
Hong Kong	9,037	7,800	9,849	1,154	845
Korea; Republic of	2,409	2,795	3,497	744	927
Australia	1,523	1,051	1,399	101	8
China	0	160	782	78	27
Mexico	337	773	576	92	108
New Zealand	465	215	315	0	0
Singapore	591	295	284	17	36
Philippines	102	73	233	0	16
Other Countries	194	428	426	1	120
Grand Total	113,100	105,795	113,318	18,247	15,870

*Marketing year August-July.

Orange Juice Situation

Orange juice production in the Northern Hemisphere in 2001/02 is estimated at 1.1 million tons, 65 degrees Brix, up nearly 3 percent from 2000/01. U.S. production of orange juice during 2001/02 is forecast at 1.0 million tons, up from 970,211 tons the previous year. U.S. exports during 2001/02 are forecast at 97,450 tons, up nearly 12 percent year to year.

Northern Hemisphere

United States

U.S. production of orange juice in 2001/02 is forecast at 1.0 million tons, up over 3 percent from the 2000/01 level. According to the January 11, 2002, NASS Crop Production report, Florida frozen concentrated orange juice (FCOJ) yield projection is 1.58 gallons per box of 42.0 degrees Brix. This is an increase from the December 2001 projection of 1.55 gallons per box. The early and midseason yield is projected at 1.52 gallons per box. The Valencia FCOJ yield is forecast at 1.68 gallons per box.

U.S. exports of orange juice are forecast at 97,450 tons, up nearly 12 percent from the level exported in 2000/01. U.S. exports during 2000/01 were 87,209 tons down 16 percent from the previous year. U.S. imports of orange juice are estimated at 192,050 tons, an increase of nearly 5 percent from the previous year. U.S. consumption of orange juice during 2001/02 is forecast at 1.12 million tons, up 6 percent from the previous year's level. However, consumption at this level is still depressed from the 1999/2000 level. Ending stocks of orange juice are forecast at 441,000 tons, down 5 percent from the previous year.

Italy

In 2001/02 Italy's orange juice output is forecast to increase by 13 percent due to a large fruit supply. Citrus fruits delivered to processors consist mainly of fruit that is in excess, or not of high enough quality for the fresh market. However, non-concentrated orange juice production is expanding in Italy, due to growing consumer demand, especially for non-concentrated fresh orange juice, which is considered to be a healthier, and higher quality product. The demand for this type of juice, which is produced almost exclusively with domestically-produced oranges, may lead to more fruit produced specifically for the juice sector.

Italy's exports of orange juice are forecast at 28,000 tons in 2001/02, down 2,000 tons from the previous year. As a result of the reform of the EU citrus regime, the Italian citrus processing sector has become more competitive. Deficiencies in domestic supply when local citrus production is poor

are compensated for by large stocks and orange juice imports from Brazil entering the EU through Northern European ports.

Spain

Deliveries of fresh oranges to processors during 2001/02 are forecast at 670,000 tons, producing a forecast 43,000 tons of orange juice. In Spain, oranges are not grown specifically for juice production; rather they are primarily those that have been rejected for fresh consumption. Most orange juice plants are located in the orange-producing areas in the Valencia region and in Andalucia. Faced with strong competition from other beverages, orange juice remains the favorite juice and consumption is expected to grow in 2001/02. Orange juice represents about 35 percent of the local fruit juice market. Total annual per capita consumption of orange juice is estimated at about 6 liters.

Orange juice exports during 2001/02 are forecast to be lower than during the previous season. Orange juice imports during the same time frame are forecast at 35,000 tons. About 50 percent of the total imported is concentrated orange juice, and the remaining is single strength, while a large percentage of orange juice exported, mainly to other EU countries, is single strength.

Japan

Japan's imports of orange juice in 2001/02 are forecast at 110,000 tons, down 5 percent from the previous year. Brazil is, by far, the largest supplier of orange juice to Japan, accounting for 82 percent of the 116,245 tons imported during October-September 2000/01. The duties on imported orange juice range from 21.3 to 25.5 percent.

Mexico

FCOJ production for 2001/02 is forecast at 37,000 tons, 12 percent higher than 2000/01 production due to the expected higher international prices. Juice production depends heavily on the international price of FCOJ. The Mexican industry is expecting prices to rise to at least $0.90 per pound for calendar year (CY) 2002. The general uncertainty of the FCOJ industry has not changed from previous years. Unless FCOJ export prices are good, enabling processors to increase the price paid to fruit producers, it is unlikely that juice concentrate production will increase dramatically. Due to financial problems of the processing industry, there has been a concentration of ownership.

In general, the industry does not expect domestic consumption to increase dramatically because of the availability of fresh oranges in the domestic market. The majority of Mexico's consumers demand fresh-squeezed juice instead of processed orange juice. Consumption for 2001/02 is expected to remain constant, due to a decrease in consumption from the hotel and restaurant industry being offset by a steady availability of fresh, domestic oranges. Most of the orange juice produced in Mexico goes to the export market.

Exports of FCOJ for 2001/02 are forecast to increase to approximately 33,500 tons. Exports are expected to rise because of higher demand and international prices. The main market for Mexico's orange juice is the United States, with Japan and European countries also becoming important markets. Any export growth is forecast to be limited to the needs of Florida's industry to mix their juice with a higher sugar-ratio and more colored Mexican juice.

(This article was prepared or estimated on the basis of official statistics of foreign governments, other foreign source material, and, in particular, reports of Agricultural Attachés and Foreign Service Officers, results of office research, and related information. The FAS Attaché Report search engine contains reports on the Orange Juice industries for approximately 10 countries, including Mexico and Brazil. For information on production and trade, contact Debra A. Pumphrey at 202-720-8899.)

ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING COUNTRIES IN NORTHERN HEMISPHERE

Country/Year 1/	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
	Metric tons, 65 Degrees Brix 2/					
Greece 3/						
1998/99	2,044	10,000	10,000	4,500	17,500	44
1999/00	44	16,500	11,000	6,000	18,500	3,044
2000/01	3,044	15,350	8,500	7,560	19,000	334
2001/02 F	334	7,400	12,000	3,400	16,000	334
Italy 4/						
1998/99	30,000	25,000	14,000	28,000	28,000	13,000
1999/00	13,000	40,000	30,000	38,000	30,000	15,000
2000/01	15,000	38,000	30,000	41,000	31,000	11,000
2001/02 F	11,000	43,000	28,000	42,000	32,000	8,000
Mexico 4/						
1998/99	5,900	45,300	1	45,001	3,200	3,000
1999/00	3,000	41,000	1	37,801	3,200	3,000
2000/01	3,000	33,000	1	30,501	3,000	2,500
2001/02 F	2,500	37,000	1	33,501	3,000	3,000
Morocco 5/						
1998/99	4,788	9,500	943	9,913	1,934	3,384
1999/00	3,384	13,800	283	12,612	2,000	2,855
2000/01	2,855	4,000	400	4,800	2,300	155
2001/02 F	155	5,200	500	3,400	2,300	155
Spain 6/						
1998/99	5,100	45,300	25,500	56,600	18,000	1,300
1999/00	1,300	52,000	32,200	73,700	10,800	1,000
2000/01	1,000	46,000	35,000	70,000	11,000	1,000
2001/02 F	1,000	43,000	35,000	65,000	13,000	1,000
Turkey 5/						
1998/99	1,356	9,700	934	102	10,600	1,288
1999/00	1,288	11,000	1,195	167	11,500	1,816
2000/01	1,816	10,700	1,481	112	12,000	1,885
2001/02 F	1,885	10,700	1,500	100	12,200	1,785

ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING COUNTRIES IN NORTHERN HEMISPHERE

Country/Year 1/	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
	Metric tons, 65 Degrees Brix 2/					
United States 5/						
1998/99	379,122	879,165	245,802	106,842	1,017,414	379,833
1999/00	379,833	1,071,926	241,412	103,515	1,130,869	458,787
2000/01	458,787	970,211	183,439	87,209	1,059,328	465,900
2001/02 F	465,900	1,003,642	192,050	97,450	1,123,142	441,000
Northern Hemisphere Total						
1998/99	428,310	1,023,965	297,180	250,958	1,096,648	401,849
1999/00	401,849	1,246,226	316,091	271,795	1,206,869	485,502
2000/01	485,502	1,117,261	258,821	241,182	1,137,628	482,774
2001/02 F	482,774	1,149,942	269,051	244,851	1,201,642	455,274

1/ Year refers to marketing period which usually begins in the fall for the Northern Hemisphere and corresponds to the harvesting and marketing period for fresh citrus.

2/ Includes all processed orange juice whether or not concentrated. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent.

3/ Marketing season begins September 1 of first year shown.

4/ Marketing season begins January 1 of second year shown.

5/ Marketing season begins October 1 of first year shown.

6/ Marketing season begins November 1 of first year shown.

7/ Marketing season begins December 1 of first year shown.

F Forecast

Sources: National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census. Florida Department of Citrus. Reports from U.S. Agricultural Counselors and Attaches and/or FAS/USDA estimates.

ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING COUNTRIES IN SOUTHERN HEMISPHERE

Country/Year 1/	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
	Metric tons, 65 Degrees Brix 2/					
Australia 3/						
1998/99	27,035	17,214	21,990	2,557	43,965	19,717
1999/00	19,717	22,471	21,887	2,346	44,942	16,787
2000/01	16,787	12,701	27,356	1,954	44,942	9,948
2001/02 F	N/A	N/A	N/A	N/A	N/A	N/A
Brazil 3/ 4/						
1998/99	263,000	1,360,000	0	1,295,000	16,000	312,000
1999/00	312,000	1,180,000	0	1,265,000	16,000	211,000
2000/01	211,000	960,000	0	1,055,000	16,000	100,000
2001/02 F	N/A	N/A	N/A	N/A	N/A	N/A
South Africa 5/						
1998/99	3,338	15,750	0	6,338	10,250	2,500
1999/00	2,500	20,000	100	9,500	11,500	1,600
2000/01	1,600	20,500	110	11,000	10,000	1,210
2001/02 F	N/A	N/A	N/A	N/A	N/A	N/A
Southern Hemisphere Total						
1998/99	293,373	1,392,964	21,990	1,303,895	70,215	334,217
1999/00	334,217	1,222,471	21,987	1,276,846	72,442	229,387
2000/01	229,387	993,201	27,466	1,067,954	70,942	111,158
2001/02 F	N/A	N/A	N/A	N/A	N/A	N/A
World Total						
1998/99	721,683	2,416,929	319,170	1,554,853	1,166,863	736,066
1999/00	736,066	2,468,697	338,078	1,548,641	1,279,311	714,889
2000/01	714,889	2,110,462	286,287	1,309,136	1,208,570	593,932
2001/02 F	N/A	N/A	N/A	N/A	N/A	N/A

1/ Marketing year indicated is for aggregation purposes with countries from the Northern Hemisphere corresponding to the harvesting and marketing period for fresh citrus. For the Southern Hemisphere, orange harvest occurs entirely during the second year shown.
2/ Includes all processed orange juice whether or not concentrated. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent.
3/ Marketing season begins July 1 of second year shown.
4/ Includes small quantities of tangerine juice.
5/ Marketing season begins February 1 of second year shown.
F Forecast

Source: National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census. Florida Department of Citrus. Reports from U.S. Agricultural Counselors and Attaches and/or USDA/FAS estimates.

BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ 1/

	1997	1998	1999	2000	2001 F
			Million Boxes 2/		
Oranges, Sao Paulo					
Production 3/	420	342	395	355	286
Fresh Consumption	98	60	92	79	57
Fresh Exports	2	2	3	2	3
Processed	320	280	301	274	226
FCOJ, Brazil	1,000 Metric Tons, 65 Degrees Brix 4/				
Beginning Stocks 5/	126	236	263	312	211
Production					
Sao Paulo	1,353	1,156	1,310	1,140	935
Other States	37	28	50	40	25
Total	1,390	1,184	1,360	1,180	960
Exports 6/					
Sao Paulo	1,228	1,110	1,245	1,225	1,030
Other States	37	28	50	40	25
Total	1,265	1,138	1,295	1,265	1,055
Consumption	16	19	16	16	16
Ending Stocks	236	263	312	211	100

1/ Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated.
2/ 40.8 kilograms or 90 pounds.
3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines used for processing.
4/ One metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix, or 1,405.88 gallons at single strength equivalent.
5/ Sao Paulo stocks.
6/ Includes tangerine juice.
F Forecast

U.S. EXPORTS OF ORANGE JUICE
MARKETING YEARS

Destination	1998/1999	1999/2000	2000/2001	2000/2001 October	2001/2002 October
			Metric tons, 65 Degrees Brix 1/		
Canada	34,622	33,143	35,426	2,703	2,577
Belgium-Luxembourg	10,384	23,526	18,966	895	1,003
Japan	28,738	18,771	13,224	1,978	0
Korea; Republic of	12,395	9,835	8,338	524	859
United Arab Emirates	4,119	5,255	3,449	236	155
Mexico	1,024	1,129	1,360	90	139
Hong Kong	1,577	2,534	1,061	114	24
Thailand	404	505	395	35	34
Taiwan	137	293	390	11	2
United Kingdom	613	350	320	15	1
Singapore	1,266	676	296	32	8
Norway	223	204	278	8	25
Bahamas; The	901	908	275	31	3
Saudi Arabia	147	240	253	8	26
Trinidad and Tobago	154	238	239	51	33
Greece	240	144	215	46	38
Netherlands Antilles	155	181	214	22	17
Costa Rica	331	227	212	7	13
Germany	74	132	181	12	15
Leeward-Windward Islands	234	306	166	0	1
Italy	107	120	142	4	8
Philippines	126	43	128	15	3
Nicaragua	40	204	123	13	11
Sweden	318	226	111	18	8
Lebanon	4	55	107	27	10
Brazil	23	4	105	0	0
New Zealand	20	16	91	0	0
Iceland	531	493	86	7	7
Honduras	82	79	83	3	5
Israel	100	17	76	6	9
Switzerland	1,584	1,758	70	3	0
Other	3,608	1,903	831	78	43
Grand Total	104,279	103,515	87,209	6,990	5,078

Marketing Years--October-September.

1/ Data includes both frozen concentrate and single strength orange juice.

U.S. IMPORTS OF ORANGE JUICE
MARKETING YEARS

Origin	1998/1999	1999/2000	2000/2001	2000/2001 October	2001/2002 October
			Metric tons, 65 Degrees Brix 1/		
Brazil	185,342	168,322	119,651	14,121	11,118
Mexico	35,357	30,494	24,200	1,807	1,568
Costa Rica	17,423	24,275	22,604	1,745	1,143
Belize	7,927	11,802	9,341	2,101	0
Honduras	657	3,488	4,358	381	424
Canada	1,133	1,130	1,731	111	130
Dominican Republic	23	292	1,147	7	41
Argentina	287	508	84	21	0
Jamaica	2	306	71	0	0
Italy	169	88	58	0	1
Total Other Countries	885	707	192	0	65
Grand Total	249,206	241,412	183,439	20,294	14,491

Marketing Years--October-September.

1/ Data includes both frozen concentrate and single strength orange juice.

Situation and Outlook for Avocados

Production increases in the world's top avocado-producing countries will raise world avocado supplies to 1.6 million metric tons in 2001/02, up 8 percent from last year. The United States, the world's second-largest producer, showed the greatest increase in production this year, reaching 212,572 tons, up 22 percent from last year. This increase was offset by decreases in production by Israel, Spain and South Africa. Mexican avocado exports increased by 134 percent in 2000/01, due to an unexpectedly large crop. World avocado exports in 2001/02 are forecast to increase by 22 percent, due to the export orientation of producers in Mexico, Chile, Israel, Spain, and South Africa. While U.S. exports remain small, they are forecast to increase slightly to 3,500 tons in 2001/02, due to larger supplies.

Commodity Profile

World production of avocados was 2.4 million tons in calendar year (CY) 2001, an increase of less than one percent from the previous year. Mexico led the world by producing 940,000 tons, 40 percent of the world total. The United States was the second largest producer with 164,500 tons. Other countries in the top five included Indonesia (130,000 tons) , Chile (120,000 tons) and Peru (89,800 tons).

Total exports of avocados in 2000 reached 310,671 tons, up 13 percent from 1999 and 15 percent from 1998. The top exporters in 2000 were Mexico (29 percent), Chile (18 percent), South Africa (16 percent), Israel (14 percent) and Spain (14 percent). Other key exporters included France and the Netherlands.

In 2000, France led the world by importing 105,249 tons of avocados, 31.2 percent of total world imports of avocados that year. Key exporters to the French market include Israel, Spain and South Africa, comprising 35, 24 and 15 percent of the market, respectively. The United States imported 78,533 tons, the second largest amount in 2000. Other key importers included the Netherlands, United Kingdom, Japan and Canada.

Mexico

USDA's Animal and Plant Health Inspection Service (APHIS) administers an export inspection program which allows Mexican avocados to be exported to selected states in the United States. On November 1, 2001, USDA/APHIS published in the U.S. Federal Register the "Mexican Avocado Import Program Final Rule," which increased the number of states where Mexican Hass avocados could be distributed and lengthened the shipping season. Under the final rule, approximately 11,897 hectares were deemed eligible to export to 31 U.S. states (up from 19 states in 2000/01). However, on December 18, 2001, the California Avocado Commission filed a lawsuit in federal court against

USDA. The suit asks that the USDA rule be declared invalid and seeks an injunction against its continued implementation.

Although Mexico is by far the world's largest avocado producer, only 6 percent of production is exported. U.S. imports from Mexico in 2000/01 totaled 11,285 tons, down 16 percent from 1999/2000. However, the United States became Mexico's largest export market in 2000/01, edging out El Salvador, which fell to second. Total Mexican avocado exports in 2000/01 reached 52,475 tons, an increase of 134 percent from the 1999/2000 season, attributable to an unexpectedly large crop, which allowed producers to meet both domestic and foreign demand. If the expanded access is allowed to stand, exports to the United States are expected to double. Total Mexican avocado exports are forecast to reach 70,000 tons in 2001/02. Imports of fresh avocados into Mexico are negligible, reflecting its status as the world's largest producer and strict phytosanitary import conditions.

United States

In 2000/01, production was exceptionally high, increasing by 22 percent from the previous year. Production for 2001/02 is forecast at 210,000 tons. The official 2001/02 estimate of U.S. avocado production will not be available from USDA's National Agricultural Statistics Service (NASS) until July 2002.

U.S. exports of avocados continued their downward trend in 2000/01, falling 50 percent below the previous year's level, due to high domestic consumption. Exports are forecast to rebound slightly to 3,500 tons in 2001/02, due to larger supplies. On the other side of the trade picture, U.S. fresh avocado imports rose 16 percent from 1999/2000 to76,650 tons in 2000/01,as imports from Chile rose 10 percent. Chile now accounts for 68 percent of total U.S. imports, up 10 percent from the previous year. Mexico and the Dominican Republic are the other primary suppliers of fresh avocados to the U.S. market, accounting for 15 and 12 percent of the imports, respectively. U.S. processed avocado imports are overwhelmingly of Mexican origin. Imports of processed avocados decreased 9 percent in 2000/01, but are likely to increase slightly in 2001/02, due to expected increases in Mexican shipments.

The Agriculture Marketing Service (AMS) is currently conducting formal rule-making to establish the Hass Avocado Promotion, Research, and Information Program, which was authorized by the Hass Avocado Promotion, Research, and Information Act of 2000. The purpose of the program is to increase consumption of Hass avocados in the United States. The Act authorizes assessments on fresh domestic Hass avocados and fresh and processed Hass avocado imports. Exports of domestic Hass avocados would be exempt from the assessment. An increase in domestic demand for Hass avocados would benefit U.S. producers and exporters as well as foreign suppliers such as Chile, Mexico and New Zealand.

South Africa

Production in 2001/02 is forecast at 100,000 tons, up 25 percent from 2000/01, which was an "off" year. Exports for 2001/02 are forecast at 54,000 tons, up 33 percent from last season. Approximately 45 percent of the South African crop is exported, with more than 80 percent going to France, Belgium and the United Kingdom. The South African Avocado Grower's Association plans to increase exports to the United Kingdom to take advantage of growing demand in that market. They will face major competition from Spanish avocados, which held 96 percent of the market in 2000/01.

Chile

Production for 2001/02 is forecast to continue its upward trend, increasing 12 percent from 2000/01, due to new orchards reaching production. Future expansion in production will come mainly from Hass varieties which were planted in the last few years and targeted for exports. Hass avocados represent 75 percent of total production. Chilean avocado producers have initiated a large- scale promotion to increase domestic consumption. Consequently, consumption is forecast to increase by 10 percent in 2001/02.

Exports are expected to increase 14 percent in 2001/02 to 60,000 tons, due to larger supplies and increased promotion efforts. Chile's exporters are still overwhelmingly dependent on the U.S. market, with approximately 93 percent of total 2001 exports shipped to the United States. Chilean avocados held 68 percent of the U.S. market in 2000/01. That market share will be challenged in 2001/02 with increasing opportunities for Mexican avocados. Chile imported negligible quantities of avocados in 2000/01, primarily from Peru.

Spain

Avocado production in 2001/02 is forecast at 60,000 tons, up 28 percent from last year's revised estimate, due mainly to favorable climate conditions and new orchards beginning to yield. Domestic consumption is estimated to increase by 40 percent in 2001/02 because of high production and lower prices. Other factors influencing the increase in consumption are a shift in consumer preferences and a change in the demographics of the population. Exports are forecast to increase 14 percent from last year to 45,000 tons. The EU continues to be Spain's primary market for avocados, with France accounting for 63 percent of the total. During MY 2001, Spain imported 5,000 tons, an increase of 11 percent from 2000. France and Peru continue to be the primary providers to the Spanish avocado market. However, a potential Free Trade Agreement between the EU and Mexico could open the door for significant imports of Mexican avocados.

Israel

Production for 2001/02 is forecast to increase by 11 percent following a year (2000/01) when production was down by 18 percent; this is consistent with cyclical nature of the Israeli crop.

Despite significant investment in research and development to improve crop yields, the national average is increasing very slowly. Major reasons for low yields are deterioration of water quality and sub-optimal climate and soil conditions in groves in marginal areas.

Exports in 2001/02 are forecast at 44,000 tons, up 17 percent from last year and consistent with the production trend. Consumption is expected to remain the same as last year. Almost all of Israel's avocados are shipped to Europe, with over 50 percent going to France. The primary exporter to France is Cote d'Ivoire, with 46 percent of the market, Israel is the second largest, representing 12 percent of the market. Israel does not import avocados due to phytosanitary restrictions.

(The FAS Attache Report search engine contains reports on the avocado industry for 5 countries, including Mexico, South Africa, Chile, Israel and Spain. For information on production and trade, contact Edwin Lewis at 202-720-5028. For information on marketing contact Steve Shnitzler at 202-720-8495).

Avocados: Production, Supply and Distribution in Selected Countries
Marketing Years 1997/98 - 2001/02
(Metric Tons)

Country/ Marketing Year 1/	Production	Imports	Total Supply	Exports	Fresh Domestic Consumption	Total Distribution
Chile						
1997/98	86,500	0	86,500	44,514	41,986	86,500
1998/99	80,550	0	80,550	34,787	45,763	80,550
1999/00	95,000	0	95,000	52,049	42,951	95,000
2000/01	98,000	0	98,000	52,500	45,500	98,000
2001/02 F	110,000	0	110,000	60,000	50,000	110,000
Israel						
1997/98	64,000	0	64,000	35,000	26,000	64,000
1998/99	46,000	0	46,000	26,000	18,000	46,000
1999/00	77,000	0	77,000	45,900	29,100	77,000
2000/01	63,000	0	63,000	38,000	23,000	63,000
2001/02 F	70,000	0	70,000	44,000	24,000	70,000
Mexico						
1997/98	762,336	0	762,336	34,117	714,486	762,336
1998/99	550,000	0	550,000	38,571	493,429	550,000
1999/00	876,623	0	876,623	22,415	809,208	876,623
2000/01	898,168	0	898,168	52,475	800,693	898,168
2001/02 F	970,000	0	970,000	70,000	855,000	970,000
South Africa						
1997/98	100,000	0	100,000	52,000	38,000	100,000
1998/99	65,000	0	65,000	33,000	24,000	65,000
1999/00	104,000	0	104,000	54,000	38,000	104,000
2000/01	80,000	0	80,000	36,000	35,200	80,000
2001/02 F	100,000	0	100,000	45,000	46,000	100,000
Spain						
1997/98	60,000	3,560	63,560	54,878	8,682	63,560
1998/99	73,000	2,650	75,650	44,900	30,750	75,650
1999/00	58,000	3,600	61,600	46,300	15,300	61,600
2000/01	47,000	4,500	51,500	39,400	12,100	51,500
2001/02 F	60,000	5,000	65,000	45,000	20,000	65,000
United States 2/						
1997/98	161,706	47,775	209,481	4,230	205,251	209,481
1998/99	144,469	55,539	200,008	6,060	193,948	200,008
1999/00	166,287	66,214	232,501	3,454	229,047	232,501
2000/01	212,572	76,650	289,222	1,712	287,510	289,222
2001/02 F	210,000	75,000	285,000	3,500	281,500	285,000
Total						
1997/98	1,234,542	51,335	1,285,877	224,739	1,034,405	1,285,877
1998/99	959,019	58,189	1,017,208	183,318	805,890	1,017,208
1999/00	1,376,910	69,814	1,446,724	224,118	1,163,606	1,446,724
2000/01	1,398,740	81,150	1,479,890	220,087	1,204,003	1,479,890
2001/02 F	1,520,000	80,000	1,600,000	267,500	1,276,500	1,600,000

1/ Marketing Years: Israel - September/October; Chile and South Africa - calendar year of the second year shown; Mexico - August/July; Spain - July/June; United States - November/October.

2/ Import and export data from Census Bureau, Department of Commerce

F = Forecast

Sources: Reports from USDA/Foreign Agricultural Service (FAS) attache reports, USDA/NASS estimates, and U.S. Department of Commerce.

U.S. Exports of Fresh Avocados
Marketing Years (November/October): 1996/97 - 2000/2001
Metric Tons

Destination	1996/97	1997/98	1998/99	1999/2000	2000/2001
European Union					
Belgium-Luxembourg	15	0	0	0	0
France	104	0	3	36	20
Germany	21	19	0	0	3
Netherlands	1,151	1,691	2,713	384	0
Spain	20	98	444	94	0
Sweden	39	0	0	0	0
United Kingdom	346	377	755	497	10
Other Countries	19	0	21	0	1
Subtotal	**1,715**	**2,185**	**3,936**	**1,011**	**34**
North America					
Canada	1,304	1,091	934	915	998
Mexico	10	5	210	34	121
Subtotal	**1,314**	**1,096**	**1,144**	**949**	**1,119**
Asia					
China/Hong Kong	80	45	2	1	5
Japan	1,784	750	838	1,236	407
Korea; Republic of	88	40	46	77	116
Subtotal	**1,952**	**835**	**886**	**1,314**	**528**
Total	**4,981**	**4,116**	**5,966**	**3,274**	**1,681**
Other Countries	21	114	94	180	31
Grand Total	5,002	4,230	6,060	3,454	1,712

Source: U.S. Bureau of the Census

U.S. Imports of Fresh Avocados
Marketing Years (November/October): 1996/97 - 2000/2001
Metric Tons

Origin	1996/97	1997/98	1998/99	1999/2000	2000/2001
Bahamas; The	688	189	211	137	224
Belize	0	14	0	0	0
Chile	17,451	32,903	36,666	38,758	52,145
Costa Rica	0	4	38	0	0
Dominican Republic	6,860	6,509	6,395	9,928	9,317
Ecuador	0	0	0	0	0
Honduras	0	0	0	0	0
Jamaica & Dep	0	0	0	0	3
Mexico	1,909	7,655	10,537	13,444	11,285
New Zealand	192	483	1,688	3,940	3,672
Other Countries	17	18	4	7	4
Grand Total	**27,117**	**47,775**	**55,539**	**66,214**	**76,650**

Source U.S. Bureau of the Census

U.S. Imports of Prepared Avocados
Marketing Years (November/October): 1996/97 - 2000/2001
Metric Tons

Origin	1996/97	1997/98	1998/99	1999/2000	1999/2000
Costa Rica	0	0	0	0	0
France	0	3	0	0	0
Japan	0	0	1	0	0
Mexico	13,016	15,734	17,224	23,145	21,048
New Zealand	0	0	0	3	0
Philippines	18	5	4	13	8
South Africa; Republic of	0	0	159	494	74
Grand Total	**13,034**	**15,742**	**17,388**	**23,655**	**21,130**

Source U.S. Bureau of the Census

Processed Tomato Products Situation and Outlook in Selected Countries

Production of tomatoes for processing in 11 major producing countries in 2001 is estimated at 20.6 million tons, down 8 percent from 2000 and down 15 percent from 1999's record output, due mostly to surplus supplies. The most notable declines were registered in Chile, Greece, and the United States. Production of tomato paste in selected countries, excluding the United States, in 2001/02 is estimated at 1.19 million tons, down 11 percent from 2000 and down 21 percent from 1999's record level of 1.50 million tons, due mainly to surplus supplies and low international prices. Production of canned tomato products in major producing countries in 2001/02 is estimated at 1.97 million tons, down 9 percent from last year and down 14 percent from the 1999 record of 2.31 million tons, due mostly to a decline in the Italian output. During this same period, exports of tomato paste pack from selected countries are estimated at 841,000 tons, down 8 percent from the previous year, due mainly to smaller shipments from Turkey, Greece, and Chile. Exports of canned tomato pack from major producing countries are estimated at 982,000 tons, down slightly from 2000/01.

In the **United States**, production of tomatoes for processing under contract in 2001 is estimated at 8.6 million tons, down 11 percent from 2000. The decline in output was due mostly to a 5-percent decrease in contracted acreage accompanied by a 2.36 ton per acre reduction in yield between 2000 and 2001. In California, yields are down due to frost and hail during mid-March and April and a May heat wave, with temperatures in excess of 100 degrees, causing bloom loss. Michigan growers experienced drought-like conditions for several weeks before harvest, causing below average yields. Also, industry is still seeking to reduce the large carryover stocks and to improve low wholesale prices caused by the bankruptcy of Tri-Valley Growers (one of the largest processors of canned tomatoes in the United States). The bulk of U.S. tomatoes for processing goes for tomato paste production.

During the first 10 months of 2001, U.S. exports of tomato products (canned tomatoes, tomato paste, ketchup and tomato sauce) totaled 247,000 tons valued at $191 million, up12 percent in volume and 9 percent in value, from the same period in 2000. Canada remained the number one U.S. customer for tomato paste, sauce, ketchup and canned tomatoes. Mexico is also a key market for U.S. processed tomato products. U.S. imports of processed tomato products (canned tomatoes, ketchup, tomato paste and sauce) during the same period totaled 119,000 tons valued at $66 million, up 79 percent in volume and up 55 percent in value, due mostly to a huge increase in tomato sauce imports from Italy.

In **Mexico**, production of tomatoes for processing in 2001 is estimated at 136,000 tons, down 13 percent from the 156,000 tons forecast earlier. This decline was due mainly to lower area planted due to large tomato supplies in Mexico and Florida over the past two years and due to less utilization by the Mexican processing industry. Tomato consumption for MY 2001/02 is forecast to be slightly higher than last year, due to higher supplies and lower prices. However, final tomato consumption depends on tomato exports to the United States, because domestic consumption tends to be a residual after exports. Tomato paste production in Mexico in 2001 is estimated at 17,000 tons compared with 30,000 tons forecast earlier, due to a decrease in international demand and high international inventories. Low international demand forced many companies to reduce production. Tomato paste production for 2002/03 is forecast at 16,000 tons, down 6 percent compared to the 2001/02 production estimate.

In **Brazil**, the production of tomatoes for processing in 2001 is estimated at 1.24 million tons, due mostly to higher-yielding varieties and few problems with pests. About 70-75 percent of Brazilian production of tomatoes for processing goes into paste and puree, and the remainder into sauces. Output of paste in 2001 is estimated at 130,000 tons, up 18 percent from 2000, due to a 3-percent increase in area planted and higher yields due to fewer problems with pests and diseases. Some producers have begun to shift area from the production of tomatoes into bananas, grapes, mangoes, guavas and other more profitable crops because of the high costs associated with combating disease and the white fly in the Bahia Region.

In **Chile**, planted area and production are projected to drop significantly in 2001 as a result of marketing problems. A substantial reduction in international demand, together with poor economic results last year and bad prospects for next year, have forced the industry to reduce planting contracts significantly. Production of tomatoes for processing in 2001 is estimated at 600,000 tons, down from the 898,000 tons produced in 2000. This decline was due to unfavorable weather conditions during the harvesting season. The bulk of Chile's tomatoes for processing goes into tomato paste pack, with the remainder slated for canned and tomato sauce production. Output of tomato paste in 2001 is estimated at 74,000 tons, down 26 percent from 2000, due to reduced planting contracts by industry in an effort to improve quality. As the demand for paste has fallen, the industry is reportedly trying to stay in business by reducing quantity while improving quality, hoping to get better prices. Poor economic results during the last season, together with unstable economic conditions of Chile's main export markets (Argentina, Brazil), have forced the industry to reduce production at all levels. Industry sources have indicated that payments for exports, mainly to Argentina, are uncertain. Chile's canned tomato production includes whole peeled, crushed peeled and diced tomatoes.

Mediterranean Area

Production of tomatoes for processing in 2001 in the major producing countries in the European Union (EU) is estimated at 8.4 million tons, down slightly from 2000.

France is a minor producer of processed tomato products. The EU threshold for France set in 2001 by the EU under the reformed common market organization for fruits and vegetables amounted to 401,000 tons, i.e., 5 percent of the total EU threshold for tomatoes for processing. Higher quotas exist in Italy, Greece, Spain, and Portugal. Production of tomatoes for processing in France for 2001 has been revised to 298,000 tons, down 5 percent from 2000, due mostly to lower planted area. During the same period, the production of tomatoes for paste was revised to 40,000 tons, down 7 percent from 2000. French production of canned tomatoes in 2001 was also revised to 7,000 tons, down 56 percent from 2000. The downward revisions in paste and canned output were due largely to a decline in fruit delivered to processors. France remains a net importer of both canned tomatoes and tomato paste.

In **Turkey**, production of tomatoes for processing in 2001 is estimated at 1.6 million tons, down slightly from 2000, due mostly to reduced area. Nearly all of Turkey's industrial tomato output goes into paste production. Production of tomato paste in 2001 is estimated at 170,000 tons. Many factors affected production, including financial concerns and weather conditions. After large increases in world production of tomato paste in the past few years accompanied by lower international prices, some local processors have reportedly not been able to pay farmers for last year's crop. As a result, some producers have switched area from tomatoes to other cash crops such as corn, vegetables and wheat, for a better return on their investment. Also, an extremely dry summer shortened the growing season and reduced yields. In addition, high domestic interest rates caused production costs for processors to increase and contributed to their financial strains. Turkish tomato paste exporters are said to have lowered their prices from $600 per ton in 2000 to $570 per ton in 2001. China, with its low-priced tomato paste, is reported to be a strong competitor to Turkish exports in the Asian markets. Japan, Russia, Saudi Arabia, Malaysia, Germany, and Korea were Turkey's leading markets in 2000.

In **Greece**, production of tomatoes for processing in 2001 is estimated at 1 million tons. Approximately 90 percent of the industrial tomato production is slated for production of tomato paste, passata and juice. Estimated output of tomato paste in 2001 has been cut to 152,500 tons, due mainly to a large decline in fruit delivered to processors. The quality of last year's tomatoes varied from good to average. During the same period, production of canned tomatoes is estimated at 24,500 tons, down 34 percent from the previous year, reflecting the large drop in fruit delivered to processors. Extreme weather conditions, including snow storms, frost and low temperatures, during the first week of January 2002 have significantly hurt Greece's agricultural production. Field crops, such as tomatoes for processing, were also affected. The actual impacts and the magnitude of the damage to crops will be recorded by the end of January 2002 by the Agricultural Insurance Fund (ELGA) and the Agency for State of Emergency Planning (PSEA).

In **Spain**, production of tomatoes for processing in 2001 is estimated up 13 percent to 1.6 million tons. The increase was due to a larger area planted and good growing conditions. Good weather conditions during the summer resulted in a very good crop of tomatoes for processing. Under the new Common Agricultural Policy (CAP) of the European Union, subsidies are allocated to farmers

instead of to industry. The new system will result in larger production of areas with higher productivity as well as in larger total production of tomatoes for processing. Despite the fact production was higher than the quota, no penalties are expected for calendar year (CY) 2002 since Italian and Portuguese production are expected to be below their quotas. According to several sources, three new processing plants could be built in the next two years in Extremadura, the largest tomato area in Spain.

During this same period, estimated output of canned tomatoes was increased slightly to 219,000 tons, due mostly to larger-than-expected deliveries of fruit to processors. Production of tomato paste has been increased to 190,400 tons, also due to larger deliveries of fruit to processors.

The export of tomato products is expected to rise in CY 2001 due to the strength of the U.S. dollar and higher domestic production in Spain. Strong competition from Moroccan tomatoes is resulting in lower prices for Spanish tomatoes in both the EU and domestic market. About 40 percent of processed tomato production is exported as canned whole tomatoes or tomato concentrate. The bulk of processed exports go to other EU markets, with the Netherlands, Germany, the United Kingdom, and France being the main destinations. Spain exports relatively small amounts of processed tomato products to the United States.

In **Italy**, estimated production of tomatoes for processing in 2001 has been lowered 6 percent to 4.6 million tons, due mainly to low international prices of canned and paste packs. Estimated production of canned tomatoes has been lowered 19 percent to 1.7 million tons, due to decreased deliveries to processors and to a large carry over. Production of tomato paste in Italy in 2001 is estimated at 310,000 tons, down 9 percent from 2000, due to a decrease in deliveries of tomatoes to processors and low international prices. In 2001, exports are expected to account for 100 percent of Italy's total paste pack.

Italy is the EU's largest producer of tomatoes and the second largest in the world. About 50 percent of tomatoes grown for processing are cultivated in southern Italy, mainly in Apulia. Area planted for processing tomatoes increased in response to an increased production quota set by the reform of the EU's Market Organization. According to the newly reformed Market Organization quota, the new production limit for Italy is 4.35 million tons of tomatoes for processing beginning in the 2001/02 marketing year, a 22 percent increase from 2000/01..

In **Portugal**, production of tomatoes for processing in 2001 is estimated at 920,000 tons, up 8 percent from 2000, due mostly to heavy rains in April and May, followed by a period of very dry weather during the growing season. However, despite the difficult beginning of the season, the crop progressed smoothly through the month of October. The 2001/02 crop is considered to have unusually high yields but it is believed that the combination of good weather plus some rains during the whole season contributed to this situation. Crop quality and color is reportedly very good.

Output of processing tomatoes in Portugal consists mainly of tomato paste. Tomato paste production in Portugal in 2001 is estimated at 155,000 tons. Portugal exports the bulk of its tomato paste pack. In 2000/01, exports of tomato paste reached 124,400 tons. The main export market continues to be the rest of the EU, followed by Japan. Sales to the United States are minimal, accounting for only 278 tons of total exports in 2000/01.

In **Israel**, production of tomatoes for processing in 2001 is estimated at 174,000 tons, down 22 percent from 2000, due mainly to reduced area planted caused by extremely dry conditions. Planted area for processing tomatoes is dictated by the quantities processors are willing to receive. Israel is experiencing a severe water crisis and irrigation quotas have been cut by an average of 50 percent throughout most of the country. In regions where profitable tree crops are grown, the area planted to field crops has been cut back significantly in order to provide sufficient water to maintain the health of the trees.

Production of tomato paste is estimated at 20,880 tons. It is becoming increasingly difficult for Israeli processors to compete in international markets. Low cost, large-scale producers such as China are having major impact on Israeli production and exports of processed tomato products. The pressure on the processors affects the size of planted area in Israel. According to trade sources, it is highly unlikely that the planted area in Israel will return to the 300 ton levels of recent years unless processors develop new products or enter into some new niche markets.

Production of canned tomatoes in Israel in 2001 is estimated at 14,400 tons, down 19 percent from the previous year, due mainly to fewer deliveries to processors. The existence of surplus supplies of tomato products in the international market led processors to contract for fewer tomatoes in 2001. Israel exports the bulk of its canned tomatoes and tomato paste output.

(***The FAS Attache Report search engine contains reports on Tomatoes and Tomato Products industries for more than 10 countries, including the United states, Italy, France and Chile. For information on production and trade, contact Erik Hansen at 202-720-0875. For information on marketing contact Elizabeth Mello at 202-720-9903. Also, please visit the processed vegetables commodity page: http://www.fas.usda.gov/htp/horticulture/Proc_Veg.html for the latest information on processed tomato products.***)

Table 1: Production of Processing Tomatoes in Selected Countries

Region/ Country	1996	1997	1998	1999	2000	2001
	Thousand Metric Tons					
North America						
United States 1/	10,350	9,047	8,523	11,645	9,632	8,552
Mexico	250	300	290	190	156	136
Total	10,600	9,347	8,813	11,835	9,788	8,688
South America						
Brazil	1,000	950	1,225	1,245	1,200	1,240
Chile	962	912	950	950	898	600
Total	1,962	1,862	2,175	2,195	2,098	1,840
Western Mediterranean						
Italy	4,150	3,520	4,372	4,900	4,810	4,600
Greece	1,350	1,245	1,325	1,350	1,150	1,000
Spain	1,254	981	1,336	1,687	1,382	1,566
Portugal	905	772	988	997	855	920
France	284	286	327	364	314	298
Total	7,943	6,804	8,348	9,298	8,511	8,384
Eastern Mediterranean						
Turkey	1,850	1,080	2,050	2,050	1,700	1,550
Israel	256	176	267	307	223	174
Total	2,106	1,256	2,317	2,357	1,923	1,724
Total Mediterranean	10,049	8,060	10,665	11,655	10,434	10,108
Grand Total	21,706	19,269	21,365	24,230	22,320	20,636

Source: U.S. Agricultural Attache Reports, FAS, USDA.

1/ Production data for 2001 is based on contracts.

Table 2: Canned Tomatoes 1/
Production, Supply and Distribution in Selected Countries

Marketing Year 2/	Beginning Stocks	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stocks
			Metric Tons				
Brazil							
1999/2000	2,855	2,150	4,675	9,680	165	8,660	855
2000/2001	855	2,300	6,000	9,155	195	8,600	360
2001/2002	360	2,600	6,200	9,160	200	8,750	210
Chile							
1999/2000	1,107	8,000	0	9,107	5,733	3,300	74
2000/2001	74	6,000	0	6,074	1,972	3,300	802
2001/2002	802	5,900	0	6,702	2,850	3,400	452
France							
1999/2000	9,937	21,600	83,322	114,859	5,140	100,000	9,719
2000/2001	9,719	16,030	88,629	114,378	5,894	100,000	8,484
2001/2002	8,484	7,000	93,000	108,484	4,000	100,000	4,484
Greece							
1999/2000	1,999	31,800	16,000	49,799	16,000	32,000	1,799
2000/2001	1,799	36,900	14,000	52,699	18,000	32,500	2,199
2001/2002	2,199	24,500	18,000	44,699	12,000	32,500	199
Israel							
1999/2000	3,640	24,865	200	28,705	12,500	8,100	8,105
2000/2001	8,105	17,824	280	26,209	14,000	8,400	3,809
2001/2002	3,809	14,400	300	18,509	8,509	8,500	1,500
Italy							
1999/2000	113,000	1,984,000	15,000	2,112,000	805,000	890,000	417,000
2000/2001	417,000	1,888,000	12,000	2,317,000	900,000	900,000	517,000
2001/2002	517,000	1,700,000	10,000	2,227,000	900,000	920,000	407,000
Spain							
1999/2000	200	232,000	1,830	234,030	57,369	156,661	20,000
2000/2001	20,000	195,623	2,817	218,440	54,548	158,000	5,892
2001/2002	5,892	219,000	2,500	227,392	55,000	162,000	10,392
Total							
1999/2000	132,738	2,304,415	121,027	2,558,180	901,907	1,198,721	457,552
2000/2001	457,552	2,162,677	123,726	2,743,955	994,609	1,210,800	538,546
2001/2002	538,546	1,973,400	130,000	2,641,946	982,559	1,235,150	424,237

Source: U.S. Agricultural Attache Reports, FAS/USDA

1/ Includes whole peeled, and/or wedged, diced, crushed, and other non-concentrated products.

2/ Marketing Years are July-June with the exception of France's which is August-July, and Brazil which is May-April.

Table 3: Tomato Paste

Production, Supply and Distribution in Selected Countries, Metric Tons

Marketing Year 1/	Beginning Stocks	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stocks
Brazil							
1999/2000	17,449	110,000	500	127,949	1,000	125,350	1,599
2000/2001	1,599	130,000	400	131,999	1,000	126,500	4,499
2001/2002	4,499	130,000	400	134,899	1,000	127,500	6,399
Chile							
1999/2000	1,363	102,000	0	103,363	87,584	11,680	4,099
2000/2001	4,099	100,000	0	104,099	91,000	11,680	1,419
2001/2002	1,419	74,000	0	75,419	62,000	11,710	1,709
France							
1999/2000	6,444	48,100	83,713	138,257	8,613	91,000	38,644
2000/2001	38,644	43,000	84,177	165,821	5,992	94,000	65,829
2001/2002	65,829	40,000	80,000	185,829	10,000	98,000	77,829
Greece							
1999/2000	4,000	203,000	4,000	211,000	152,500	15,500	43,000
2000/2001	43,000	180,000	3,500	226,500	190,000	15,500	21,000
2001/2002	21,000	152,500	4,500	178,000	155,000	15,500	7,500
Israel							
1999/2000	1,500	35,300	0	36,800	13,980	13,400	9,420
2000/2001	9,420	25,510	0	34,930	16,431	13,650	4,849
2001/2002	4,849	20,880	0	25,729	12,229	12,000	1,500
Italy							
1999/2000	118,000	370,000	56,000	544,000	310,000	74,000	160,000
2000/2001	160,000	340,000	65,000	565,000	350,000	74,000	141,000
2001/2002	141,000	310,000	65,000	516,000	350,000	74,000	92,000
Mexico							
1999/2000	0	50,700	10,693	61,393	23,645	37,748	0
2000/2001	0	21,000	17,183	38,183	7,176	31,007	0
2001/2002	0	17,000	17,000	34,000	6,000	28,000	0
Portugal							
1999/2000	25,000	170,471	0	195,471	122,700	45,121	27,650
2000/2001	27,650	155,955	0	183,605	135,000	38,605	10,000
2001/2002	10,000	160,000	0	170,000	130,000	35,000	5,000
Spain							
1999/2000	9,400	191,400	8,100	208,900	60,000	128,000	20,900
2000/2001	20,900	169,718	15,058	205,676	75,967	126,000	3,709
2001/2002	3,709	190,400	20,000	214,109	77,000	128,000	9,109
Turkey							
1999/2000	9,673	320,000	0	329,673	190,638	114,000	25,035
2000/2001	25,035	265,000	0	290,035	134,914	117,000	38,121
2001/2002	38,121	170,000	0	208,121	100,000	105,000	3,121
Grand Total							
1999/2000	191,466	1,498,971	163,006	1,853,443	883,076	644,119	326,248
2000/2001	326,248	1,330,183	185,318	1,841,749	916,480	636,262	289,007
2001/2002	289,007	1,190,780	186,900	1,666,687	841,229	623,000	202,458

Source: U.S. Agricultural Attache Reports, FAS/USDA. 1/ Marketing Year (July-June), with the exception of France (August-July), Brazil (May-April), Mexico (March-February), and Turkey (September-August).
2/ 28-30 Percent TSS Basis.

Table 4: United States Exports
Canned Tomatoes, Ketchup, Tomato Paste/Puree, and Tomato Sauce 1/

Commodity/ Destination	1996/97	1997/98	1998/99	1999/00	2000/01
	Metric Tons				
Canned Tomatoes:					
Canada	22,909	24,320	20,736	28,052	30,661
Japan	11,271	6,293	13,055	10,916	2,400
Korea; Republic of	2,181	382	1,431	776	777
Mexico	1,052	1,947	955	1,512	3,429
Other	8,318	4,655	3,101	4,689	9,942
Total	45,731	37,597	39,278	45,945	47,209
Ketchup:					
Japan	9,844	9,390	8,861	6,283	5,997
Canada	4,890	6,771	5,148	5,879	8,405
Mexico	4,842	4,223	4,201	7,186	7,129
Brazil	430	417	4,035	909	71
Hong Kong	4,641	3,458	3,474	3,567	2,475
Israel	638	1,371	2,171	1,295	2,020
United Kingdom	1,790	334	1,725	1,651	286
Netherlands Antilles	788	649	969	597	502
Saudi Arabia	1,230	1,240	923	1,156	1,015
Other	11,394	12,455	13,102	9,714	9,223
Total	40,487	40,308	44,609	38,237	37,123
Tomato Paste:					
Canada	50,160	46,171	41,556	46,097	47,701
Japan	10,168	14,340	7,455	10,274	16,748
Dominican Republic	2,963	116	6,891	77	901
Korea; Republic of	7,502	10,634	5,472	6,465	7,989
Philippines	2,456	5,804	4,623	4,288	508
Mexico	5,195	5,307	3,768	7,188	12,670
Taiwan	1,239	1,839	2,058	1,819	823
Hong Kong	1,313	1,313	1,428	1,061	1,466
Haiti	3,631	3,247	1,183	2,097	536
Other	44,567	47,054	3,353	10,458	8,307
Total	129,194	135,825	77,787	89,824	97,649
Tomato Sauce:					
Canada	52,721	63,686	71,206	69,465	66,642
Mexico	4,054	5,757	6,303	6,287	10,640
Japan	4,773	4,265	3,278	3,809	6,078
Saudi Arabia	954	1,441	1,917	806	1,305
Korea; Republic of	777	1,840	1,734	2,617	1,765
United Kingdom	1,776	1,586	1,489	3,711	4,345
Netherlands	1,243	1,250	1,201	1,525	1,266
Sweden	1,040	1,324	1,015	1,409	1,341
Israel	196	930	709	2,251	1,401
Guatemala	50	91	703	1,809	1,667
Other	8,920	10,101	8,797	12,546	15,887
Total	76,504	92,271	98,352	106,235	112,337

Source: U.S. Department of Commerce, Bureau of the Census. 1/ Marketing Year (July-June).

Table 5: United States Imports

Canned Tomatoes, Ketchup, Paste/Puree, and Sauce 1/

Commodity/ Origin	1996/97	1997/98	1998/99	1999/00	2000/01
			Metric Tons		
Canned Tomatoes:					
Italy	44,155	50,134	41,800	4,260	2,940
Israel	5,339	6,729	11,206	5,641	1,190
Canada	7,057	6,142	10,190	2,861	2,846
Spain	7,092	8,351	6,690	2,248	1,035
Chile	4,431	2,554	3,657	542	725
Turkey	1,111	515	141	321	41
Other	2,087	2,266	977	1,182	2,408
Total	71,272	76,691	74,661	17,055	11,185
Ketchup:					
Canada	17,097	31,786	38,747	37,871	39,207
China; Peoples Republic of	0	0	222	380	402
Hong Kong	1	0	45	0	9
India	12	17	16	13	31
Japan	0	0	16	0	0
Other	22	11	15	50	78
Total	17,132	31,814	39,061	38,314	39,727
Tomato Paste:					
Chile	667	492	27,302	2,347	669
Mexico	7,381	8,411	22,815	6,884	3,509
Peru	654	0	5,948	1,238	795
Israel	4,440	1,180	4,722	6,735	2,214
Italy	509	426	4,657	175	729
China; Peoples Republic of	0	0	4,265	3,361	6,282
Canada	387	149	1,635	96	14
Portugal	0	8	1,295	0	0
Turkey	214	63	1,282	324	342
Other	180	270	2,113	64	288
Total	14,432	10,999	76,034	21,224	14,842
Tomato Sauce:					
Canada	4,976	5,385	5,636	6,037	7,741
France	0	0	3,016	0	0
Portugal	6	6	1,108	0	3
Dominican Republic	1,641	1,266	902	1,848	3,191
Italy	504	822	674	1,086	1,715
Mexico	254	69	560	3,210	2,915
Other	269	327	589	381	343
Total	7,650	7,875	12,485	12,562	15,908

Source: U.S. Department of Commerce, Bureau of the Census. 1/ Marketing Year (July-June).

Total U.S. wine exports are beginning to level off after years of large increases. Competition for market share heats up on a global scale with new world wine producers expanding wine production and aggressively marketing their products. The more traditional wine-producing countries of the European Union strive to cut production, improve quality, and struggle to maintain market share.

Largest U.S. Wine Export Markets

United Kingdom (UK)

The UK is the world's largest importer of wine and the largest market for U.S. wines. During January through October 2001, U.S. exports of wine to the UK increased 22 percent in value and 35 percent in quantity from the same period in 2000. Exports of still wine in containers of less than 2 liters make up over 90 percent of shipments to the UK and are expected to post about a 20-percent increase over 2000. Effervescent wines showed some promise at more than a 77- percent increase over last year. Less than 3 percent of exports to the UK go in bulk form. The total value of U.S. wine exports to the UK could reach over $170 million during 2001. France has begun to lose some of its market share due to competition from the United States and Australia in products with consistent quality and more affordable prices. Nearly one third of the wine consumed in the UK is from new world (non-European) producers. This trend is also causing some steep competition for smaller producers such as Bulgaria, Hungary (despite their reduced rate of duty) and Portugal. Despite the brand and price sensitivity of the UK market, there is potential for niche markets where wines from the Pacific Northwest, New York, Virginia, and Texas could do very well.

The UK does produce a very small quantity of mostly white wine. UK consumers are buying more wine, often at the expense of beer. This trend is expected to grow with consumers learning more about wine and "trading up" to more expensive wines. The largest consumer group for wine consists of those 35-49 years of age in the middle and upper-middle class.

Red wine is showing the most growth, boosted by continued news reports of health benefits. Continuous circulation of positive reports on wine and health is a benefit to the wine industry.

Canada

Canada is the number two export market for U.S. wine. Last year the United States exported about $73 million of wine to Canada and expectations point to a total of about $66 million for the year 2001. Actual quantities shipped show a 5-percent decline for the first 10 months of 2001.

Canadians are developing an increasing taste for imported wines and currently 62 percent of purchases are of imported wines. Sales of U.S. wines are facing increasing marketing challenges due to growing competition, particularly from Italy, Australia, and Chile. Despite the growing volume of wine available on the Canadian market, Canada's domestic wine sector continues to expand. Vineyard plantings, now almost exclusively vitis vinifera, have increased about 50 percent over the past three years to approximately 6,000 hectares and this is expected to double in the next 8 to 10 years. The industry is building a strong partnership with the tourism sector, which is facilitating the marketing of Canadian wine. The United States is Canada's largest export market and U.S. imports of Canadian wine have been posting increases of about 20 percent for the last 2 years. Taiwan, Japan, and Hong Kong are also important markets for Canada.

On December 18, 2001, the Canadian Government, along with the United States, Australia, New Zealand, and Chile, signed a Mutual Acceptance Agreement of Oenological Practices. Signatories accept the principle that, for countries with mechanisms in place to regulate wine-making, the mutual acceptance of each country's wine-making regulations will facilitate international trade in wine.

Ontario's winters enable wine-makers to produce an abundant Icewine crop each year of high quality and consistency. Icewine is currently produced by more that 45 wineries in Ontario. The annual production for 1999 was over 300,000 liters; the production for 2000 was 328,000 liters.

Netherlands

U.S. wine shipments to the Netherlands increased nearly 9-fold from 1996 to 2000. Exports through October of this year are not as strong as last year in dollar terms in the face of growing competition from other new world wine producing countries. Per capita consumption for lighter alcoholic drinks continues to increase and red wine is said to be the most popular style. The Dutch meals frequently feature meat (or cheese and sausage) and this combined with the cold climate support consumer preferences for a more hearty wine type. Younger wine drinkers are more willing to experiment with different beverages, particularly new world wines. However, the general perception is that new world wines may be inferior to wines from France, Italy, Spain, or Germany. One new world wine producer, South Africa, has a unique advantage when marketing wines. South African wines often have Dutch names, which helps the Dutch consumer to identify with the product. Supermarkets make up about 68 percent of all wine retail sales, but do not sell the higher-end wines. Liquor stores generally sell more expensive wines than supermarkets.

There is some concern that the conversion to the euro will hurt U.S. wine sales in the short term. As European consumers are sensitized to the changes in currency values, they may be less inclined to spend money on non-basic items such as wine. Given the strong U.S. dollar, other competing countries such as Australia, New Zealand, and South Africa are not so adversely affected by the change.

The Netherlands produces very little wine of its own. French wine continues to dominate the Dutch market in terms of availability. The Netherlands has become a transhipping point for large U.S. companies eager to expand market share in Western Europe and quantities shipped have increased every year in recent history, with U.S. sales up 3.5 percent during January-October 2001, compared to January-October 2000. A large volume of imported U.S. wine is re-exported to Germany, Belgium, Luxembourg, Denmark, Finland and Sweden.

California wine promotions are said to have done a very good job associating wine with "sun and success." More room exists in the Netherlands for wine market development, despite a current stabilization in consumption growth. Some exporting countries continue efforts to provide consistent supply of their product. Large U.S. wine exporters, when faced with shortages in a developing market often seek to avoid price increases by cutting sales to domestic market outlets to protect their market share.

Japan

Despite recent declines in value and volume of wine shipped, Japan continues to rank third in volume as a U.S. export market. A total of 417,341 hectoliters were shipped during 2000. About 27 percent of the wine shipped to Japan during 2001 was in bulk form (containers holding over 2 liters). Much of this is bottled in country and marketed under a Japanese domestic brand name. Because of the import tariff level on bottled wine, Japanese manufacturers have a significant price advantage in re-bottling the bulk wine that is assessed at a lower tariff level.

During 2000, the U.S. ranked fourth in Japan's list of bulk wine suppliers in value but about eleventh in volume. U.S. bulk wine shipments to Japan through October of 2001 have declined 32 percent, while bottled wines (in containers holding 2 liters or less) have declined 13 percent compared to the same period in 2000. These large declines are a result of a domestic oversupply over the last 2 years combined with the lost market share due to various pricing disadvantages. The over-supply situation is expected to turn around in the short term, but U.S. wines will continue to experience competition from France, Italy, Spain, Germany and other new world wine producers.

The Market Access Program (MAP), administered by the USDA's Foreign Agricultural Service, has allocated funding during the 2001/02 marketing year (MY) to improve U.S. market share in Japan. Activities include things such as a retail display program, a newsletter, trade relations, regional programs, trade missions, and trade shows.

There is optimism that wine will become more appealing to the younger generations as the spirits beverage sector loses market share. The Japanese are showing an inclination towards drinking beverages that are lower in alcohol content due to greater awareness of health issues. Beer continues to be the most consumed alcoholic beverage. Because per capita wine consumption is well below that of Europe or the United States, substantial growth potential exists in the wine sector.

Greatest Northern Hemisphere Competition for U.S. Wine

The new EU wine regime, begun during Marketing Year 2000/01 seeks the enhancement of quality, a greater market orientation, and the renewal of old vineyards. The new EU Budget for the wine sector is being increased 3.3 percent, from 1.292 billion euros in 2001 to 1.335 billion euros ($1.178 billion) by 2003.

France

The French Ministry of Agriculture reports the 2001 wine crop at 56.2 million hectoliters, down about 6 percent from the previous level. French exports during the first half of 2001 posted some strong increases to two primary markets; Japan (ranked eighth during 2000) up 28 percent, and the UK (ranked second during 2000), up 39 percent. Other major markets for French wine include Germany, Luxemburg, the Netherlands and the United States.

The United States imported about the same amount of wine from France during 2000 as in 1999. Wine imports during 2001 are expected to be down about 3 percent from the previous year. The value of the wine imported over the last 2 years has declined 11 percent. Value declines can be attributed to less quantities of champagne (post millennium) and smaller shipments of higher-value red wine.

During 2000, demand from French consumers for new world wines was reported to have increased 45 percent. In 2001, the Government of France raised ONIVINS' (French Office for Wines and Vines) promotional budget 21 percent to $10.5 million to improve the promotion of French wines in foreign markets.

Italy

Italy's 2001 wine production decreased 5 percent to 51.5 million hectoliters from year 2000, possibly the lowest in 40 years. The year's weather factors combined with ongoing EU incentives to uproot vines have brought about the current trend. Most recently, acreage cutbacks have stabilized and Italy is still second only to France in terms of production. Italy is focused on creating higher quality wines by limiting yields. Current laws, dating from April 1992, are concerned with addressing the development in production techniques. The quality standards enable producers within already prescribed quality-designated areas to also acquire a designation of a smaller area or even vineyard of quality. This system helps to promote quality and uniqueness of the wines and improve their position on the market. The Italian wine industry is very fragmented in terms of size of winery. This adds an additional challenge in presenting a unified Italian wine marketing strategy. Currently, the larger producers are taking the lead role in redefining the quality of their wines as they are more able to afford this kind of investment. The small and mid-size wineries are lagging in this

effort, due to the financial challenges and resistance to change and outside investment. It will be harder for the smaller operations to find new markets. Declining consumption is a fact in modern Italy as life styles change. Consumers are not drinking wine as frequently at lunch as in the past and when they do consume it, they tend to favor higher quality wines.

Export data for the first half of 2001 indicated a historical change of direction, with more bottled wine being exported than bulk product. Italy's top export market in 2000 was Germany, followed by France, the United States and the United Kingdom. The largest increases in terms of higher-value wine have been going to the UK, Switzerland, and the United States.

Imports into the United States from Italy showed a 3-percent decline during January to October 2001 compared to the same period the previous year. Most of the decline can be attributed to smaller shipments of sparkling wine. Italy did ship 3 percent more higher-value white wine over the same 10-month period of 2000. High-value red wine shipments remained relatively stable.

Exports of U.S. wine to Italy declined an estimated 10 percent during 2001. However, wine that is transhipped via other EU countries is not captured in U.S. trade statistics. Actual trade levels may be higher than reported. Competition from growing domestic quality and new world wines does put pressure on efforts to expand the Italian market for U.S. wines.

Spain

Spain continues to have the most area under vines in the world. Spain continues to have large inventories of wine despite a 14-percent decline from last year's large production levels, which is expected to contribute to increased exports during 2001/02. In November 2001, according to *El Mundo,* Spain requested from the EU that 7.8 million hectoliters be distilled under the program. During January through October 2001, Spain supplied approximately 4 percent of total imported wine to the United States.

Greatest Southern Hemisphere Competition for U.S. Wine

Australia

Australian wine production during 2001/02 is expected to increase 6 percent to 9.6 million hectoliters. This production is estimated to be made up of about 34 percent white wine, 53 percent red, and 2 percent miscellaneous wines.

According to Australian Wine and Bandy Corporation (AWEC) figures: Australian wine exports reached new value and volume records in calendar 2001. The UK and United States continue to be the principal markets, accounting for more than 80 percent of the increase and 70 percent of the total volume and value of overseas sales.

AWEC is a committee of the export promotion arm of the Australian Wine and Brandy Corporation, which was formed in 1991 and conducts generic promotional programs in key overseas markets. This includes the UK, Ireland, Netherlands, Germany, Switzerland, Sweden, Denmark, Norway, Finland, the United States, and Canada. AWEC also provides export advice, statistical information and promotion material.

The Australian wine export industry is dominated by large companies. It is widely reported that the ten leading exporters account for over 85 percent of the value of all exports. Australian companies are buying wineries and seeking acquisitions and partnerships abroad to take advantage of growth projected for markets overseas. For example, The Foster's Brewing Group (Foster's Group), Australia's dominant beer maker, bought Bering Estates of California last year and is investing heavily in the wine sector. During January - October of 2001, Australia maintained about 15 percent of the total U.S. import market.

Chile

The Chileans are keeping production stable at the moment and are focusing on improving the quality of their wine. Chile has large plantings of quality vines from strains introduced to the county in the 1900s from pre-phylloxeric seed plants. Recent advances in grape and wine growing technology and the modernization of equipment and facilities have helped to put Chile on a par with countries that have a more developed potential for production and exportation of fine wines. During 2001, Chile exported 27.4 percent of its wine to the United States, Canada, and Mexico. The largest destination was the EU with 54 percent. Only 9.4 percent and 8.8 percent of wine exports went to other Latin American countries and Asia, respectively. Chile ranks fourth in terms of wine suppliers to the U.S. market, supplying about 11 percent of U.S. imports during 2000.

Chile has projected an image of economic and political stability, keeping it attractive for both domestic and foreign investments in grape and wine growing. The government provides no funds to support wine production or subsidize exports. On December 18, 2001, the Chilean Government, along with the United States, Australia, New Zealand, and Canada, signed a Mutual Acceptance Agreement of Oenological Practices (as explained above).

United States

On January 25, 2002, NASS will release the Non-citrus Fruits and Nuts Preliminary Summary, which will provide information on 1) raisin and table grape production, use and prices, 2) acreage breakout across wine, table and raisin grapes plus yield per acre 3) unutilized production by state in quantity.
Total exports January - October 2001 declined less than a 1 percent in value to $457 million but increased 6.5 percent in volume, to 2.58 million hectoliters.

Final 2000 U.S. import and export numbers will be available at this link and also via the U.S. Trade

online Database on February 21, 2002.

For a complete selection on FAS worldwide reporting visit http://www.fas.usda.gov. Regular wine reports are published on Argentina, Australia, Chile, South Africa, France, Germany, Italy, Japan, Mexico, Spain, Sweden, and the United Kingdom. Periodic worldwide voluntary reports are also available. Also, please visit our new trade database on line at http://www.fas.usda.gov/ustrade.

Check out the wine webpage at http://www.fas.usda.gov/htp/horticulture/wine.html. For information on production and trade, contact Heather Page Velthuis at 202-720-9792. For information on marketing contact Yvette Wedderburn Bomersheim at 202-720-0911.

World Trade Situation and Policy Updates

California Avocado Commission Sues USDA for Expanding Avocado Imports from Mexico

On December 18, 2001, the California Avocado Commission filed a lawsuit in federal court against USDA, challenging the department's decision to expand the number of states into which avocados grown in Mexico can be imported and the length of time during which those imports are allowed. In 1997, USDA decided to allow Mexican avocados to be imported to 19 states during a four- month period. After the review in November 2001, Mexican avocados were allowed into 31 states and were permitted to be marketed until April 15. The lawsuit claims that USDA did not properly evaluate the risk of allowing importation of avocados from areas in Mexico known to be infested with fruit flies and other pests. The suit alleges that these pests threaten not only the domestic avocado industry, but also domestic apple, citrus, cherry, peach, plum and other crops. The United States is Mexico's top export market for fresh avocados. U.S. imports were valued at $15 million in MY2000/01 (November-October), down by 33 percent from 1999/2000.

Mexico Moves to Limit Use of High Fructose Corn Syrup

On January 1, 2002, Mexican legislators approved a new 20-percent tax on sales of soft drinks using any sweetener other than cane sugar. This will principally affect U.S. shipments of high fructose corn syrup (HFCS) and corn used for the production of HFCS. Mexico consumes about 600,000 tons of HFCS annually, of which about 80 percent is used by the beverage industry. The United States annually supplies to Mexico about 250,000 tons of HFCS, and about 700,000 tons of corn which is converted into 350,000 tons of HFCS. The new tax is expected to generate about $7.5 billion in annual revenues. In response, bottling companies are examining whether it is profitable to exchange HFCS priced at $392/ton for domestically-produced raw sugar at $522/ton or refined sugar at $392/ton. Although Mexico's anti-dumping duties on U.S. HFCS have been ruled illegal by WTO and NAFTA panels, the Mexican government has yet to take remedial action. The American Farm Bureau Federation has indicated it expects the new tax to shut down HFCS exports to Mexico and severely hamper future corn shipments as well.

ITC to Conduct Full "Sunset" Review on Mexico Tomato Imports

On January 4, 2002, the U.S. International Trade Commission (ITC) voted unanimously to conduct a full review to determine whether termination of the suspended investigation on fresh tomatoes imported tomatoes from Mexico would likely lead to the continuation or recurrence of material injury within a reasonably foreseeable time. A suspension agreement on fresh tomatoes from Mexico was established in 1996 as a result of a dumping case filed against imported Mexican tomatoes. The agreement ran from November 1, 1996 through November 1, 2001, and established a reference price system for tomatoes imported into the United States. The ITC will issue a report following the completion of its review. U.S. imports of tomatoes from Mexico in FY2001 were valued at $515 million, up 32 percent from the preceding year.

U.S. Lettuce Exporters See New Opportunity to Expand Sales to Japan

U.S. lettuce producers/exporters are hopeful that ongoing negotiations between USDA/APHIS and MAFF officials will result in the approval of a pilot program that would bring MAFF plant health officials to the United States, possibly as early as Fall 2002, for pre-clearance of fresh lettuce exports to Japan. In the past, a large percentage of U.S. lettuce exports arriving in Japan were fumigated (damaging quality and reducing shelf life) for aphids, thrips and leaf miners, the three pests that most concern Japanese officials. U.S. exporters hope that a preclearance program in the United States will lessen the risk associated with exporting to Japan and potentially boost sales by more than $100 million per year. In FY 2001, U.S. exports of lettuce to Japan were valued at $9.2 million, up 42 percent from the previous year.

Philippines Lifts Ban on Chinese Fruits and Nuts

On January 3, 2002, FAS/Manila reported that the Philippine Department of Agriculture has lifted the ban on apples and other fruits from China. The temporary ban was removed after China successfully addressed Philippine concerns regarding the introduction of *carposina*, the pest found in a shipment of Chinese apples in October 2001. *Carposina* is an actionable pest that is not present in the Philippines. A new agreed-upon work plan requires that fruit from China be treated at origin. The Philippines is a major market for Chinese apples. In calendar year 2000, China's apple shipments to the Philippines were valued at $16 million and accounted for nearly 20 percent of total Chinese apple shipments. This compares with U.S. apple shipments to the Philippines totaling $5 million in the same year.

Extreme Weather in Greece Causes Major Crop Destruction

Reports from the Agricultural Counselor indicate that the recent extreme weather--snow storms and low temperatures--has resulted in major crop damage. Up to 530,000 tons of oranges have been destroyed, out of an estimated total crop of 1.0 million tons. Approximately 35,000 tons of lemons were destroyed, out of an estimated total of 115,000 tons. Millions of olive trees were damaged. Field vegetables, grape orchards and kiwis were also affected. Spinach fields in central Greece were totally destroyed. Indoor vegetable crops (greenhouses) were also damaged in the Attica area (Metropolitan Athens) and the Island of Crete. No indication of the magnitude of the loss was given at this time. The Ministry of Agriculture estimates that the compensation to citrus farmers this year will be near $27 million. For other crops it will be near to $8 million. Additional damage is expected from the flooding that will be caused by the melting snow.

Korea's Plans for 2002 Orange Imports Expected to Lead to Unfilled Quota

According to reports from FAS/Seoul, the Cheju Citrus Grower's Agricultural Cooperative (CCGAC) has decided it will use quota auctions to administer the calendar year 2002 Minimum Market Access (MMA) quota for oranges, with the first auction expected some time in March. This will be after the peak marketing season for Korea's domestic orange production and will mean higher prices for the imported product, since supplies of California's navels are down this year. If, as

expected, the CCGAC falls short of filling the 2002 MMA quota, this would mark the fourth year in a row that Korea has failed to import the quantities specified under the Uruguay Round agreement. Under Korea's import regime, oranges may enter within the quota with a tariff of 50 percent, or outside the quota (as of July 1997) at a 2002 duty rate of 59.8 percent. The out-of-quota duty is being phased down and will reach the in-quota rate of 50 percent in 2004, effectively terminating the quota regime. As the out-of-quota duties have approached the in-quota duties, U.S. orange exports to Korea out-of-quota have jumped sharply, exceeding the in-quota volumes for each of the past two years. The merging of the duty rates has also made it more difficult for the CCGAC to capture the dwindling quota rents, eroding the organization's competitiveness in the market and greatly reducing its incentive to purchase the import quantities specified under the MMA quota schedule. Korea has emerged as a leading market for U.S. oranges, with exports through the first 10 months of 2001 totaling nearly $50 million.

Export News and Opportunities

Every U.S. exporter wants to get paid. However, credit can make or break a deal. It can shift the advantage to you or to your competitor. That's why many exporters turn to U.S. Department of Agriculture's (USDA) Export Credit Guarantee Programs. With USDA's guarantee behind the credit, you can arrange competitive financing with less risk. Your buyers may benefit too, from longer terms and lower rates. In FY 2002, USDA has made available $4.6 billion in credit guarantees to facilitate sales to selected developing countries, Western Europe, Japan, Hong Kong, and Taiwan. Invest the time to learn more about the Export Credit Guarantee Programs, (GSM-102) and Supplier Credit Guarantee Program (SCGP), to increase your sales and lower your risks. Use GSM and SCGP to avoid possible importer and foreign bank defaults on payments and ensure that American farm and food products continue to move to markets around the world. USDA does not provide financing, but it guarantees payments due to U.S. exporters in case the foreign banks or importers default. As of December 21, 2001, U.S. horticultural exporters have registered $1.2 million in sales under SCGP. In FY 2002, the SCGP has helped to facilitate horticultural sales to the China/Hong Kong Region, Korea, Mexico, and the Southeast Asia Region. Sales have been registered under SCGP for wine, canned fruit, fruit juice concentrate, and fresh fruit.

You may learn more about GSM-102 and SCGP regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity on the Internet at:

http://www.fas.usda.gov/export.html

GSM-102

The GSM-102 program makes available credit guarantees for sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amount due and

covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

Supplier Credit Guarantee Program

On November 29, USDA for the first time has authorized $50 million in supplier credit guarantees for sales in Western Europe Region. The Western Europe Region includes Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Spain, Sweden and the United Kingdom. The FAS announcement pertinent to this allocation is PR-0426-01.

On November 14, USDA has authorized $20 million in supplier credit guarantees for sales of U.S. agricultural commodities to Russia. The FAS announcement pertinent to this allocation is PR-0395-01.

The SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

The SCGP encourages exports to buyers in countries where credit is necessary to maintain or increase U.S. sales but where financing may not be available without CCC guarantees. Under the SCGP, CCC guarantees a portion of payments due from importers under short-term financing (up to 180 days) that exporters have extended directly to the importers for the purchase of U.S. agricultural commodities and products. These direct credits must be secured by promissory notes signed by the importers. CCC does not provide financing but guarantees payment due from the importer.

GSM-102 and SCGP

The following tables present the FY 2001 GSM-102 and SCCP for which USDA has allocated credit guarantees for sales of U.S. horticultural products. The table also includes horticultural sales (exporter applications received) that have been registered under GSM-102 and SCGP. For most countries and regions, exporters may apply for credit guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities published in FAS program announcement PR 0096-01, issued March 20, 2001 or as superseded. The following horticultural products are eligible under the export credit guarantee programs: dried fruit; fresh fruit; frozen fruit; canned fruit; 100-percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract; beer; tree nuts; fresh vegetables; canned vegetables; dried vegetables; wine; and brandy. The General Sales Manager will consider requests to establish an SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products that are currently not eligible.

(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim on 202-720-0911 or Rochelle Foster on 202-720-2936).

FY 2002 GSM-102 COVERAGE

Country	Announced Allocations --coverage in millions of dollars--
Algeria	50.00
Baltic Region	15.00
Caribbean Region	120.00
Central America Region	250.00
Central Europe Region	10.00
China/Hong Kong Region	300.00
Dominican Republic	25.00
East Africa	5.00
Egypt	100.00
India	25.00
Jordan	10.00
Kazakhstan	10.00
Korea	330.00
Malaysia	30.00
Mexico	500.00
Morocco	10.00
Philippines	100.00
Poland	25.00
Romania	25.00
Russia	20.00
South America Region	600.00
Southeast Asia Region	90.00
Southeast Europe Region	25.00
Southern Africa Region	50.00
Sri Lanka	35.00
Thailand	100.00
Tunisia	20.00
Turkey	345.00
West Africa Region	14.00

NTIS® Foreign Agricultural Service Trade Publications Order Form

U.S. DEPARTMENT OF COMMERCE
Technology Administration
National Technical Information Service
Springfield, VA 22161

To order subscriptions, call 1-800-363-2068 or (703) 605-6060.
TDD (for hearing impaired only), call (703) 487-4639.

1-800-363-2068 or (703) 605-6060
Fax this form to (703) 605-6880
To verify receipt of your fax order, call (703) 605-6060.

Please PRINT or TYPE

SHIP TO ADDRESS

CUSTOMER MASTER NUMBER (IF KNOWN) | DATE

ATTENTION/NAME

ORGANIZATION | DIVISION / ROOM NUMBER

STREET ADDRESS

CITY | STATE | ZIP CODE

PROVINCE / TERRITORY | INTERNATIONAL POSTAL CODE

COUNTRY

PHONE NUMBER ( ) | FAX NUMBER ( )

CONTACT NAME | INTERNET E-MAIL ADDRESS

METHOD OF PAYMENT

☐ VISA ☐ MasterCard ☐ American Express ☐ Discover

CREDIT CARD NUMBER | EXPIRATION DATE

CARDHOLDER'S NAME

☐ NTIS Deposit Account Number:

☐ Check/Money Order enclosed for $ (PAYABLE TO NTIS IN U.S. DOLLARS)

ALL SALES ARE FINAL

NTIS electronically stores our collection of almost 3 million items and custom-reproduces a single copy specifically for your order. Therefore, NTIS does not accept cancellations, requests for modifications, or returns for credit or refund. All sales are final. If you believe the item you received is defective or if we made an error in filling your order, please contact our Subscriptions Department via e-mail at subscriptions@ntis.gov or by phone at 1-800-363-2068 or (703)605-6060.

SINGLE COPIES

To order, call NTIS Sales Desk 1-800-553-NTIS (6847) or (703) 605-6000; fax to (703) 605- 6900; or E-mail to: orders@ntis.gov.

For single copies, add $5 handling fee per total order for U.S., Canada, Mexico; $10 per total order for all other countries. RUSH service is available for an additional fee; please call the NTIS Sales Desk for details.

NO. OF SUBSCRIPTIONS	ORDER NO.	TITLES	PRICES* DOMESTIC	PRICES* INT'L	TOTAL PRICE
______	SUB9737LJX	AgExporter Magazine (12 issues)	60.00	120.00	$
______	SUB9708LJX	Cotton: World Markets & Trade (12 issues)	120.00	240.00	
______	SUB9710LJX	Dairy Monthly Imports (12 issues)	108.00	216.00	
______	SUB9739LJX	Dairy: World Markets & Trade (2 issues)	24.00	48.00	
______	SUB9713LJX	Grain: World Markets & Trade (12 issues)	132.00	264.00	
______	SUB9711LJX	Livestock & Poultry: World Markets & Trade (2 issues)	24.00	48.00	
______	SUB9735LJX	Monthly Summary of Export Credit Guarantee Program Activity (12 issues)	108.00	216.00	
______	SUB9715LJX	Oilseeds: World Markets & Trade (12 issues)	132.00	264.00	
______	SUB9717LJX	Sugar: World Markets & Trade (2 issues)	28.00	56.00	
______	SUB9718LJX	Tobacco: World Markets & Trade (4 issues)	60.00	120.00	
______	SUB9707LJX	Tropical Products (Coffee, Spices, Essential Oils) (4 issues)	60.00	120.00	
______	SUB9736LJX	U.S. Export Sales (52 issues)	312.00	624.00	
______	SUB9734LJX	Wood Products: International Trade & Foreign Markets (5 issues)	62.00	124.00	
______	SUB9719LJX	World Agricultural Production (12 issues)	132.00	264.00	
______	SUB9714LJX	World Horticultural Trade & U.S. Export Opportunities (12 issues)	132.00	264.00	

GRAND TOTAL $

Prices are subject to change.

* Prices include first-class delivery or equivalent service for domestic (U.S., Canada, and Mexico); airmail delivery for international (all other countries).

Thank you for your order!

2/2001

FOREIGN AGRICULTURAL SERVICE PUBLICATIONS

The publications listed below present timely and reliable information on U.S. and world production, supply and demand, and trade for many different commodities. All these publications can be subscribed to through the National Technical Information Service (NTIS) of the U.S. Department of Commerce. To order, call NTIS at 1-800-363-2068, (703) 605-6060, or (703) 487-4639 for TDD (hearing impaired only). A subscription form is provided on the reverse side.

AgExporter Magazine
Monthly magazine for businesses selling farm products overseas provides tips on exporting, descriptions of markets with the greatest sales potential, and information on export assistance available from the U.S. Department of Agriculture. The audience is U.S. agricultural producers, exporters, trade organizations, state departments of agriculture, and any other export-oriented organization.

Cotton: World Markets and Trade
Monthly report provides statistics and other information on U.S. and world production, supply and demand, and trade for cotton. Covers crop conditions, the latest trade policy developments, and export market information.

Dairy Monthly Imports
Monthly report of imports of cheese and other quota dairy products subject to licensing, as well as imports under the quota not subject to licensing.

Dairy: World Markets and Trade
Semi-annual publication provides information on U.S. and world production, use and trade of dairy products, trade policy developments, and export market information.

Grain: World Markets and Trade
Monthly publication provides information on U.S. and world production, supply and demand, and trade for a variety of grains. Covers crop estimates, the latest trade policy developments, and export market information.

Livestock and Poultry: World Markets and Trade
Semi-annual publication provides information on U.S. and world production, use and trade of livestock and poultry products, trade policy developments, and export market information.

Monthly Summary of Export Credit Guarantee Program Activity
Monthly summary report shows fiscal year commitment figures for the Commodity Credit Corporation's Export Credit Guarantee Program (GSM-102) and Intermediate Credit Guarantee Program (GSM-103).

Oilseeds: World Markets and Trade
Monthly publication provides data and analyses on U.S. and world production, supply, use, and trade of a variety of oilseeds and products. Covers production estimates, latest trade policy, commodity prices, and export market information.

Sugar: World Markets and Trade
Semi-annual publication provides information on the world production and supply and demand situation for sugar. Includes in-depth special country features.

Tobacco: World Markets and Trade
Quarterly report provides information on U.S. and world production, supply and demand, and trade for tobacco. Covers crop estimates, the latest trade policy developments, and export market information. The March issue contains complete U.S. tobacco trade data for the preceding calendar year.

Tropical Products: World Markets and Trade
Issued four times a year. Provides information on the world production and supply and demand situation for coffee and tea. Presents U.S. trade data on spices and essential oils.

U.S. Export Sales
Weekly report based on reports submitted by private exporters. Outstanding export sales as reported and compiled with other data give a snapshot view of the current contracting scene. All countries with outstanding sales or accumulated exports are included for each class of wheat, all wheat, wheat products, corn, soybeans, soybean cake and meal, American pima cotton, all upland cotton, whole cattle hides, and wet blues.

Wood Products: International Trade and Foreign Markets
Issued five times a year. Provides information on the production, trade, and supply and demand situation in countries around the world for wood products. Highlights the latest trade policy developments, export statistics, and market information of interest to U.S. exporters.

World Agricultural Production
Monthly report provides information on U.S. and world production of major agricultural products, including crop, weather and production briefs, and special articles of interest to the trade.

World Horticultural Trade and U.S. Export Opportunities
Monthly publication provides information on the world situation and outlook for horticultural products. Covers export competition, foreign market import potential, and export opportunities for U.S. horticultural products.

NTISPR1061 2/2001

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
1400 INDEPENDENCE AVENUE, SW
WASHINGTON, DC 20250-1004

For questions concerning your subscription or change of address, PRINT OR TYPE the new address, including ZIP code and return this sheet to:

U.S. DEPARTMENT OF COMMERCE
TECHNOLOGY ADMINISTRATION
NATIONAL TECHNICAL INFORMATION SERVICE
SPRINGFIELD, VA 22161

For questions or concerns on the data included in this publication, contact us at the address shown above.

Now Available On-Line

Summaries and selected tables from many Foreign Agricultural Service world market and trade reports are available electronically. The reports include U.S. Export Sales (available electronically after 8:30 a.m. on release day); Grain: World Markets and Trade; Oilseeds: World Markets and Trade; Cotton: World Markets and Trade; Tobacco: World Markets and Trade; World Agricultural Production; the early release version of World Horticultural Products and U.S. Export Opportunities; and Tropical Products: World Markets and Trade (all available electronically after 3:00 p.m. Washington DC time on release day) as well as Sugar: World Markets and Trade; Livestock and Poultry: World Markets and Trade; Dairy: World Markets and Trade, and U.S. Planting Seed Trade (available within a week after release.)

You can read the reports on the FAS home page (http://www.fas.usda.gov). The reports remain "current" until the succeeding issue is available. Older issues are available in the archives section of the home page. We also make selected cover articles and graphics available from these publications, in a separate section of the site. Reports are also available from the Economic Bulletin Board at Stat-USA, on the same schedule. For more information, you may contact Stat-USA at (202) 482-1986 (Monday-Friday, 8:30-5:30 p.m. Washington, DC time.)

For more information on the FAS home page, contact Harold Kanarek, tel. (202) 720-0328; fax. (202) 720-1727; or via e-mail kanarekH@fas.usda.gov